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ABSTRACT

The Instructional Support Team (IST) process is an intensive building-based pre-referral intervention program using teams of teachers and other school professionals to assist elementary students experiencing difficulty in the classroom. This trainer's manual presents a model workshop for training principals. The workshop's goals are to: (1) increase understanding of the IST process; (2) understand the role of the principal in the IST process; (3) recognize belief systems or paradigms of self and others as they relate to the education of children at risk or with special needs; (4) gain an understanding of inclusion and how it relates to the IST process; and (5) understand how IST is connected to other programs, initiatives, and goals within the school and district. The 4-day workshop is divided into 12 sessions. The manual provides a detailed outline of each session for the workshop leader, along with handouts and overheads, and directions for small group discussions. Topics covered include: the background and use of the IST process, "the change game," curriculum based assessment, IST computer programs, effective interaction patterns, role playing, marketing IST, and starting to make connections. (ND)

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# IST

# The Instructional Support Team

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J. F. Kovaleski

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

## Pennsylvania Principals' Training Model:

## Trainer's Manual

Joseph F. Kovaleski, editor

*A Systematic Search for What Works!*

**Instructional Support Team**
**Project of Pennsylvania**
**1110 Enterprise Road**
**East Petersburg PA 17520**

#213
6-95

SP037544

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"IN THE LONG RUN, THE RACE BELONGS NOT MERELY TO THE SWIFT, BUT TO THE FARSEEING, TO THOSE WHO ANTICIPATE CHANGE."

-Lykes Lines

# AGENDA
# PENNSYLVANIA PRINCIPALS' TRAINING MODEL FOR INSTRUCTIONAL SUPPORT

| | | |
|---|---|---|
| TUESDAY | **10:00 - 12:00** | **REGISTRATION** |
| | 1:00 - 1:30 | SESSION I "GENERAL WELCOME"<br>(Large Group)<br>Introductions:<br>Facilitators<br>PDE/BSE<br>IST Consultants<br>Shield Activity (Think) |
| | 1:30 - 2:30 | SESSION 2 Keynote<br>(Large Group)<br>Dr. Joseph Kovaleski<br>Director of the IST Project |
| | 2:30 - 2:45 | BREAK - Move to small groups |
| | 2:45 - 4:00 | SESSION 3 "Day 1 Revisited"<br>(Small Group)<br>Introduction of Training Teams<br>Shield Activity (Pair and Share) |
| WEDNESDAY | 9:00 - 10:15 | SESSION 4 "IST Through the Decades"<br>(small group) |
| | 10:15 - 10:45 | BREAK - Move to auditorium |
| | 10:45 - 11:45 | SESSION 5 "GATEWAYS"<br>(Large Group) |
| | 12:00 - 1:00 | LUNCH |
| | 1:00 - 2:30 | SESSION 6 "The Change Game"<br>(Small Group)<br>Introduction<br>Year One |
| | 2:30 - 2:45 | BREAK |
| | 2:45 - 4:00 | SESSION 7 "The Change Game"<br>(Small Group)<br>Year Two<br>Debrief |

## THURSDAY

| | | |
|---|---|---|
| 9:00 - 10:00 | SESSION 8 | Curriculum Based Assessment<br>or<br>IST computer program<br>or<br>Effective Interaction Patterns |
| 10:00 - 10:15 | BREAK | |
| 10:15 - 12:00 | SESSION 8 | (continued) |
| 12:00 - 1:00 | LUNCH | |
| 1:00 - 2:30 | SESSION 9<br>(Small Group) | "Role Play" |
| 2:30 - 3:00 | Break | |
| 3:00 - 3:45 | SESSION 10<br>(Small Group) | Questions and Answers |

## FRIDAY

| | | |
|---|---|---|
| 9:00 - 10:00 | SESSION 11<br>(Large Group) | "Marketing IST" |
| 10:00 - 10:30 | BREAK | |
| 10:30 - 11:30 | SESSION 12<br>(Small Group)<br>Chapter V<br>Shield # 2 | "Starting to Make Connections" |

# PENNSYLVANIA'S
# PRINCIPAL
# TRAINING MODEL
# FOR
# INSTRUCTIONAL SUPPORT

## GOALS

1. To increase understanding of the Instructional Support Team process.
2. To understand the role of the principal in the Instructional Support Team process.
3. To recognize belief systems/paradigms of self and others as they relate to the education of children at risk or with special needs.
4. To gain an understanding of inclusion and how it relates to the Instructional Support Team Process
5. To understand how IST is connected to other programs, initiatives and goals within your school and district.

# Acknowledgment

The Instructional Support Team initiative is now entering its fifth year of implementation. When this summer's workshops are completed, over 1,100 elementary principals will have received "basic training" in the workings of IST. We have learned many things, most notably the importance of the role a principal plays in the IST process. The leadership abilities and 'people skills' that must be present are an integral part of this initiative's success.

Your being here is a statement of commitment to this project. It is our intention to honor that commitment with pertinent information that will help your building's students meet with success. The Pennsylvania's Principal Training Model (PPTM) is, by design, an on-going and collaborative effort, by fellow educators, to facilitate the implementation of this important project. The committee has taken a hard look at previous training evaluations. Past workshops focused upon educational philosophies and attitudes. Though these remain as issues that need to be examined and considered, attention is now directed toward the "mechanics" of IST and practical suggestions for coping with common problems that are occurrences at the building level.

To that end, the committee hopes this model will provide principals the understanding of IST's philosophy, its basic workings, and an open forum for discussion of concerns they may have as how best to approach the planning for IST.

A special thank you to the following people who contributed to the development of Pennsylvania's Principal Training Model:

| | |
|---|---|
| John Aigeldinger | Pennsylvania Department of Education, Bureau of Special Education |
| Kerri Bloom | Pennsylvania's GATEWAYS Project |
| Patricia Burns | Regional Instructional Support Team Consultant |
| Dr. Andrea Coulter | Riverview Intermediate Unit 6 |
| Joanne Darling | Crawford Central School District |
| Priscilla Enggren | Pennsylvania's Mid-State Instructional Support Center |
| Dr. Jacques Gibble | Donegal School District |
| Dr. Joseph Kovaleski | Director, Instructional Support Team Project |
| Joseph Krueger | Pennsylvania's Mid-State Instructional Support Center |
| Jeannie Martin | Regional Instructional Support Team Consultant |
| Alma Miller | Instructional Support Team Project |
| Leslie Muthard | East Penn School District |
| Marcia Rex | Pennsylvania's Eastern Instructional Support Center |
| Dr. Linda Rhen | Pennsylvania Department of Education, Bureau of Special Education |
| Dr. Amy Sichel | Abington School District |
| Dr. Barry Smith | Shippensburg University of Pennsylvania |
| Dr. Paul Solley | State College Area School District |
| Janice D. Srock | Williamsburg Community School District |
| Dr. Joyce Videlock | Pennsylvania's Eastern Instructional Support Center |
| Doug Weickert | Colonial Northampton Intermediate Unit 20 |
| Nikki Woods | Pennsylvania Department of Education, Bureau of Special Education |

# DAY 1 - General Instructions

- Sessions 1 and 2 will provide an overview of the total training package.

- Facilitators will make every effort to stick to the schedule without "cutting off" questions that participants may have.

- Participants should understand that each day is an opportunity to have their questions and concerns addressed. You should feel comfortable with utilizing the collective knowledge assembled for this training. Because of numerous individual needs, requirements, and constraints, it should also be made clear not all issues have a concrete solution.

- PPTM is an overview!!! Training and building action planning will be driven by existing building services and identified needs.

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# SESSION 1

**(1:00 - 1:30)**
(Principals Facilitating)
(Large Group)

# WELCOME AND INTRODUCTIONS

This session is designed to establish the overall focus of the Principals' Training Model. This will focus on the principal as an instructional leader.

# FACILITATOR'S DIRECTIONS

**I. WELCOME AND INTRODUCTIONS.** *[Performed by a Principal]* (20 minutes)

- Statewide participants from districts participating in IST
- Principal Facilitators
- IST Consultants
- PDE/BSE Representatives

**II. SHIELD ACTIVITY.** *Lead Principal* (10 minutes)

After a very brief (no more than two minutes) description of the shield activity's purpose, the lead principal will ask participants to **think** and respond to the four questions on the shield activity:

1. What was a critical element learned during local training?
2. What is the most pressing issue you face since receiving local training?
3. How does IST help pull together other initiatives in your building?
4. What is an IST issue you want to talk about with you consultant?

**Materials Needed:**
Shield Handout

# Handouts for Session 1

# SHIELD ACTIVITY

For a very brief period, medieval scientists were known to have dabbled in the merits of cardboard armor.

1. What was a critical element learned during local training?

2. What is the most pressing issue you face since receiving local training?

3. How does IST help pull together other initiatives in your building?

4. What is an IST issue you want to talk about with you consultant?

# Overheads for Session 1

# PENNSYLVANIA'S
# PRINCIPAL
# TRAINING MODEL
# FOR
# INSTRUCTIONAL SUPPORT

## GOALS

1. To increase understanding of the Instructional Support Team process.

2. To understand the role of the principal in the Instructional Support Team process.

3. To recognize belief systems/paradigms of self and others as they relate to the education of children at risk or with special needs.

4. To gain an understanding of inclusion and how it relates to the Instructional Support Team Process

5. To understand how IST is connected to other programs, initiatives and goals within your school and district.

# SHIELD ACTIVITY

For a very brief period, medieval scientists were known to have dabbled in the merits of cardboard armor.

1. What was a critical element learned during local training?

2. What is the most pressing issue you face since receiving local training?

3. How does IST help pull together other initiatives in your building?

4. What is an IST issue you want to talk about with you consultant?

# SESSION 2

**(1:30 - 2:30)**
(Principals Facilitating)
(Large Group)

# OVERVIEW OF INSTRUCTIONAL SUPPORT

This session will provide a history of the Instructional Support Initiative since its inception. Basic information regarding IST will be presented.

**I. KEYNOTE BY JOE KOVALESKI, DIRECTOR, INSTRUCTIONAL SUPPORT INITIATIVE.**

- History of IST
- IST Training Model
- Goals of Principal Training as Related to the Instructional Support Initiative

# FACILITATOR'S DIRECTIONS

Someone will need to introduce Dr. Kovaleski, and perhaps serve as facilitator for questions. Someone else should also serve as "official timer". After Joe's speech and prior to break, announce where session three will take place.

**Hand out grouping lists and room assignments.**

## SESSION 3

**(2:45 - 4:00)**
(Principal Facilitators and IST Consultants)
(Small Group)

## DAY ONE REVISITED

An IST Consultant will review the "Key points" of the IST components covered at the recent local training. This presentation is followed by principal facilitators sharing their experiences with each component. Questions to the consultant and principal facilitators will follow.

**GOAL FOR THIS SESSION:** Through presentation, discussion, and questions, participants will review the major elements of Instructional Support that have proven to be effective in working with children at risk or with special needs. It further addresses the goal of understanding the IST process.

## FACILITATOR'S DIRECTIONS

**I. INTRODUCTIONS** (20 minutes)
**Lead Facilitator**
Please take a few minutes to introduce yourself, and explain your role as group facilitator(s). Have participants introduce themselves and take part in an "Ice Breaker" to get acquainted. Explain that this is their instructional group and that the room you are assigned to will be used throughout training. Review the agenda and emphasize that this training is to give principals a "head start" preparing for IST.

**II. DISCUSSION OF THE IST MODEL, COMPONENTS, AND LOCAL TRAINING** ( 20 minutes)
**Consultants**
The goals of this activity are to give participants an opportunity to review general understanding of the critical attributes of IST.

- Revised special education regulations and standards
- Elements of Instructional Support
- Relationship of IST to MDE/IEP process
- Areas of site-based discretion in developing IST at the building level.

**III. SHIELD ACTIVITY.** ( 20 minutes)
The goal of this activity is to have participants share their response from Session 1's Shield Activity. Small groups will develop questions and concerns to be addressed during future sessions.
A. Participants should share their answers to the four Shield Activity questions with one other participant. (5 minutes)
B. Group facilitators will lead discussion around these questions with entire group. (15 minutes)
**Facilitators will then collect "shields".**

# Overheads for Session 3

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# PENNSYLVANIA PRINCIPALS' TRAINING MODEL FOR INSTRUCTIONAL SUPPORT

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| | 1:30 - 2:30 | SESSION 2 Keynote<br>(Large Group)<br>Dr. Joseph Kovaleski<br>Director of the IST Project |
| | 2:30 - 2:45 | BREAK - Move to small groups |
| | 2:45 - 4:00 | SESSION 3 "Day 1 Revisited"<br>(Small Group)<br>Introduction of Training Teams<br>Shield Activity (Pair and Share) |
| **WEDNESDAY** | | |
| | 9:00 - 10:15 | SESSION 4 "IST Through the Decades"<br>(small group) |
| | 10:15 - 10:45 | BREAK - Move to auditorium |
| | 10:45 - 11:45 | SESSION 5 "GATEWAYS"<br>(Large Group) |
| | 12:00 - 1:00 | LUNCH |
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| | 2:30 - 2:45 | BREAK |
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**THURSDAY**

| | | |
|---|---|---|
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| 10:00 - 10:15 | BREAK | |
| 10:15 - 12:00 | SESSION 8 | (continued) |
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| 1:00 - 2:30 | SESSION 9<br>(Small Group) | "Role Play" |
| 2:30 - 3:00 | Break | |
| 3:00 - 3:45 | SESSION 10<br>(Small Group) | Questions and Answers |

**FRIDAY**

| | | |
|---|---|---|
| 9:00 - 10:00 | SESSION 11<br>(Large Group) | "Marketing IST" |
| 10:00 - 10:30 | BREAK | |
| 10:30 - 11:30 | SESSION 12<br>(Small Group)<br>Chapter V<br>Shield # 2 | "Starting to Make Connections" |

# Think, Pair & Share Activity

1. Work in pairs.

2. Each person will have two minutes to respond to the following questions:

**What do you need to do as a building principal to faciliatate the institutionalization of IST in your building?*

**What events have happened to facilitate the institutionalization of IST on a district-wide basis with board awareness?*

# DAY 2

## SESSION 4

**(9:00 - 10:15)**
(Principals Facilitating)
(Small Group)

# Instructional Support Throughout the Decades

This session will review the concepts of the change process and paradigms. Participants will begin to recognize their own paradigms and how these paradigms impact upon them as an instructional leader in their school community.

**GOAL FOR THIS SESSION:** Through small group activity and group discussion, participants will gain an understanding of the movement to assist special education and at risk students.

## FACILITATOR'S DIRECTIONS:

**INSTRUCTIONAL SUPPORT THROUGHOUT THE DECADES**
(45 minutes TOTAL: 10 Minutes for the activity, 35 Minutes for group presentations & discussions)

This session will review the educational services offered to special education and at-risk populations over the past four decades. Participants will review the areas of identification, programming and curriculum.

**MATERIALS: Chart paper or blank transparencies**

A. Divide the group into four groups.

B. Assign one decade grouping to each group for the activity.

**GROUPS: 60's/70's/80's/90's**

C. Explain and distribute directions for the activity.

1. Identify a recorder, reporter & group leader.
2. Answer the following questions, paraphrase your responses, and record responses on chart paper for a **BRIEF (no more than 5 minutes)** presentation to the group.

D. Ask groups to paraphrase the information discussed. Encourage them to keep it brief. **(Keep it moving!)**

E. Reflect upon the direction in which we have been moving over the past few years and that we are currently in the midst of many changes in the educational system.

# Instructional Support Through the Decades

Directions:

1. Assign a group leader, reporter and recorder for your group.
2. Prepare a brief overview of your responses. Use chart paper or an overhead transparency.

*Group Task: Discuss the following questions for the special education and at-risk populations in your assigned decade.*

## Where Served?

1. In what types of programs or services were at risk students involved?
2. What were these programs called? by the teachers? by the students?
3. Where were these programs located?
4. How were students identified for these programs?
5. Who had most of the power to involve a student in these programs? Who had the least power over a decision to "place" a student?

## Instructional Mode?

1. What (if any) specialized teaching was provided in such programs?
2. What form of grouping arrangements and management practices were unique to these programs?
3. What (if any) sort of assessment was available to decide what to teach?
4. Exactly what was taught? Describe any differences in curriculum from the regular classroom.
5. Why were things taught this way?

## Technology?

1. To what extent (if any) was teaching assisted by technology?
2. What kinds of machines or equipment were found useful?
3. For what purposes?
4. Was there a technology in use for providing special services? Describe.

## Influences?

1. What legal issues, regulations, and/or litigation were impacting on education (and special education) in that era?
2. What social values and rights (e.g., education for all) were expressed in these changes?
3. What other infuences or trends were present in society and government of the time, that had an influence on education of at risk youth?

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# Handouts for Session 4

# Instructional Support Through the Decades

Directions:

1. Assign a group leader, reporter and recorder for your group.
2. Prepare a brief overview of your responses. Use chart paper or an overhead transparency.

*Group Task:* ***Discuss the following questions for the special education and at-risk populations in your assigned decade.***

## Where Served?

1. In what types of programs or services were at risk students involved?
2. What were these programs called? by the teachers? by the students?
3. Where were these programs located?
4. How were students identified for these programs?
5. Who had most of the power to involve a student in these programs? Who had the least power over a decision to "place" a student?

## Instructional Mode?

1. What (if any) specialized teaching was provided in such programs?
2. What form of grouping arrangements and management practices were unique to these programs?
3. What (if any) sort of assessment was available to decide what to teach?
4. Exactly what was taught? Describe any differences in curriculum from the regular classroom.
5. Why were things taught this way?

## Technology?

1. To what extent (if any) was teaching assisted by technology?
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1. What legal issues, regulations, and/or litigation were impacting on education (and special education) in that era?
2. What social values and rights (e.g., education for all) were expressed in these changes?
3. What other infuences or trends were present in society and government of the time, that had an influence on education of at risk youth?

## TRENDS in EDUCATION

| | Where Served | Instructional Mode | Technology | Influences | Other |
|---|---|---|---|---|---|
| 60 | | | | | |
| 70 | | | | | |
| 80 | | | | | |
| 90 | | | | | |

## Instructional Support Through the Decades Activity

### A PARADIGM SHIFT
### SCHOOLS TURNED UPSIDE DOWN

| FACTOR | WAS/IS | EMERGING | NEEDS |
|---|---|---|---|
| 1. PEOPLE | Need for control; management vs. labor; contract bargaining guarantees; specialization of personnel leads to separate programs; posturing to promote one's position without concern for what's best for everyone. | People as prime source of capital; can never train enough; learning is life long; work to raise the stake of staff involvement in the total enterprise and concern for one another; everyone is a manager, staff set standards and monitor progress and quality of teaching and learning. | |
| 2. STRUCTURE | Communication is top-down, hierarchical, functionally driven by state and federal compliance mandates. | Flat, functional barriers broken-down; principal as developer of self-managed teams; collegial atmosphere and governance; middle management act as facilitators rather than turf guardians, student outcome driven, flex-schedule time determined by "learning task". | |
| 3. LEADERSHIP | Top-down, distant, unattached to primary business of instruction and learning; centralized strategic planning, if any exists at all; driven by multiple special interest groups; develop political consensus and leave a working consensus to the building level manager to develop; stop gap, crisis management which discourages risk-taking. | Leaders as lovers of change and preachers of vision and shared values; principal as promoter of a "community of learners" fostering personal growth of all; strategy develops from bottom up; all central office staff support the principal and self managed teams. | |

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| FACTOR | WAS/IS | EMERGING | NEEDS |
|---|---|---|---|
| 4. INNOVATION | Externally driven by state and federal mandates and reform initiatives; the bureaucracy protects the line budget from intrusion and long-term commitments; reactionary. | Nurturing risk taking and small starts; student centered; supporting the right to fail; it's everyone's business to experiment; embrace errors in pursuit of learning how to teach most effectively; driven by the need to make a difference in the life of a student; teacher/staff recognition and incentive program based in team cooperation; networking of innovation through technology. | |
| 5. ORGANIZING FOR INSTRUCTION | Grade level organization; age boundness; a teacher solely responsible for student progress, teacher's plan alone; reporting is global; state competency test driven instruction; students failing are referred to Chapter 1 and Special Education; high student dropout rate is the students' problem; the focus is on teaching where textbook driven; routine and role learning is inevitable. | Organizational units are autonomous; individual units build organizational schemata; curricular offerings are distinct by building; reporting student progress individually; building units are responsible for all students; generating alternatives to prevent student failure is the rule not the exception; the focus is on learning. | |

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| FACTOR | WAS/IS | EMERGING | NEEDS |
|---|---|---|---|
| 6. TECHNOLOGY | Centralized, time consuming main frame software development and few users; security and control primary isolated use, large group of lab teaching to mean of student group; student use driven; central office information processing for state and federal reporting grade and assessment reporting use; long user life in spite of rapidly changing improvement. | Decentralized, inexpensive software deployment; more differentiation of instruction within and outside school; networked electronic workstations support continuous individual student progress and serve as a self-development tool for teachers; networked workstations insure team communication and sharing of expertise focused on student outcomes; immediate access to all student records, interactive video and to outside information services; more self paced instructional software to promote individualized educational program; teacher developed software. | |
| 7. OTHER | | | |

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DEVELOPED AND ADAPTED BY LEONARD C. BURRELLO, PROFESSOR AND CHAIR, SCHOOL ADMINISTRATION, INDIANA UNIVERSITY FORM EXCERPTS TAKEN FROM TOM PETERS, "THRIVING ON CHAOS" AND DAVID KEARNS AND DENNIS DOYLE, "WINNING THE BRAIN RACE."

# Overheads for Session 4

# Instructional Support Through the Decades

## Directions:

1. Assign a group leader, reporter and recorder for your group.
2. Prepare a brief overview of your responses. Use chart paper or an overhead transparency.

*Group Task:* ***Discuss the following questions for the special education and at-risk populations in your assigned decade.***

## Where Served?

1. In what types of programs or services were at risk students involved?
2. What were these programs called? by the teachers? by the students?
3. Where were these programs located?
4. How were students identified for these programs?
5. Who had most of the power to involve a student in these programs? Who had the least power over a decision to "place" a student?

## Instructional Mode?

1. What (if any) specialized teaching was provided in such programs?
2. What form of grouping arrangements and management practices were unique to these programs?
3. What (if any) sort of assessment was available to decide what to teach?
4. Exactly what was taught? Describe any differences in curriculum from the regular classroom.
5. Why were things taught this way?

## Technology?

1. To what extent (if any) was teaching assisted by technology?
2. What kinds of machines or equipment were found useful?
3. For what purposes?
4. Was there a technology in use for providing special services? Describe.

## Influences?

1. What legal issues, regulations, and/or litigation were impacting on education (and special education) in that era?
2. What social values and rights (e.g., education for all) were expressed in these changes?
3. What other infuences or trends were present in society and government of the time, that had an influence on education of at risk youth?

# TRENDS in EDUCATION

| | Where Served | Instructional Mode | Technology | Influences | Other |
|---|---|---|---|---|---|
| 60 | | | | | |
| 70 | | | | | |
| 80 | | | | | |
| 90 | | | | | |

# SESSION 5

**(10:45 - 11:45)**
(Principals/ GATEWAYS Consultant)
(Large Group)

## GATEWAYS:

In this session the basic elements of the GATEWAYS Initiative will be examined. Content will focus on participants gaining a basic awareness of inclusion as the ultimate goal of the supportive school. Participants and IST consultants will continue to explore the process of assisting students with moderate to severe disabilities. The Pennsylvania GATEWAYS Project is a state-wide initiative focused on the integration and inclusion of students with severe disabilities within their neighborhood schools and communities. Based upon pilot efforts supported by the Bureau of Special Education in numerous school districts, this program provides resources to enable Pennsylvania to improve the educational services to this population.

**GOALS FOR THIS SESSION:** Participants and IST consultants will continue to explore the process of assisting students with moderate to severe disabilities.

## FACILITATOR'S DIRECTIONS

In a large group setting, participants will be led by a GATEWAYS regional consultant and project site principal facilitators throughout this session.

### I. GATEWAYS Introduction (TIME: 15 MINUTES)

GATEWAYS Consultants will introduce the project concept. Included will be a historical overview, including the standards and regulations addressing inclusion and the role of IST in this process.

- rationale for GATEWAYS
- what is Inclusion
- how IST makes it work
- on-site assistance

### II. GATEWAYS VIDEO (TIME: 20 MINUTES)

Participants will view a video of GATEWAYS' impact upon the lives of various Pennsylvania students.

### III. Problem solving and discussion (Time: 10 minutes)

Participants will be divided into small groups to identify various ways to utilize the IST components/process to facilitate the successful inclusion of all students. Using overhead, facilitators will identify the following issues to lead discussion.

Develop a list of possible building resources available to assist the process of inclusion (staff, programs, agencies, SSI, etc.)

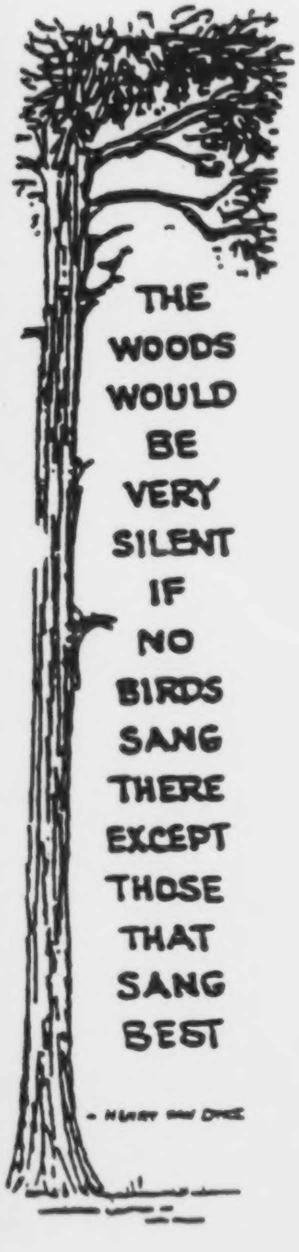
## IV. Closing Remarks

Principal facilitators will talk about the impact of IST/Gateways in their building.

**Materials:** **GATEWAYS handouts**
**Pennsylvania GATEWAYS video**

# Handouts for Session 5

# Inclusion



***Inclusion means:***

1. Children with disabilities are educated in regular school settings, regardless of the severity of their disability.
2. Special services are provided in regular schools.
3. Regular teachers and administrators are supportive.
4. Students with disabilities follow the same schedules as non-disabled students.
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8. Students with disabilities receive education and job training in regular community settings when appropriate.
9. All children are taught to understand and accept human differences.
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The fundamental principle of inclusive education is the valuing of diversity within the human community. Every person has a contribution to offer to the world. Yet, in our society, we have drawn narrow parameters around what is valued and how one makes a contribution. The way in which people with disabilities can contribute may be less apparent; they often fall outside of the goods and service-oriented, success-drive society.

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When inclusive education is fully embraced, we abandon the idea that children have to become "normal" in order to contribute to the world. Instead, we search for and nourish the gifts that are inherent in all people. We begin to look beyond typical ways of becoming valued members of the community, and in doing so, begin to realize the achievable goal of providing all children with an authentic sense of belonging.

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Salisbury, 1991

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Intended Outcomes

Frequency of Support

Means of Delivering Support

Students for Whom Approach is Intended

## Components of Full Inclusion Models

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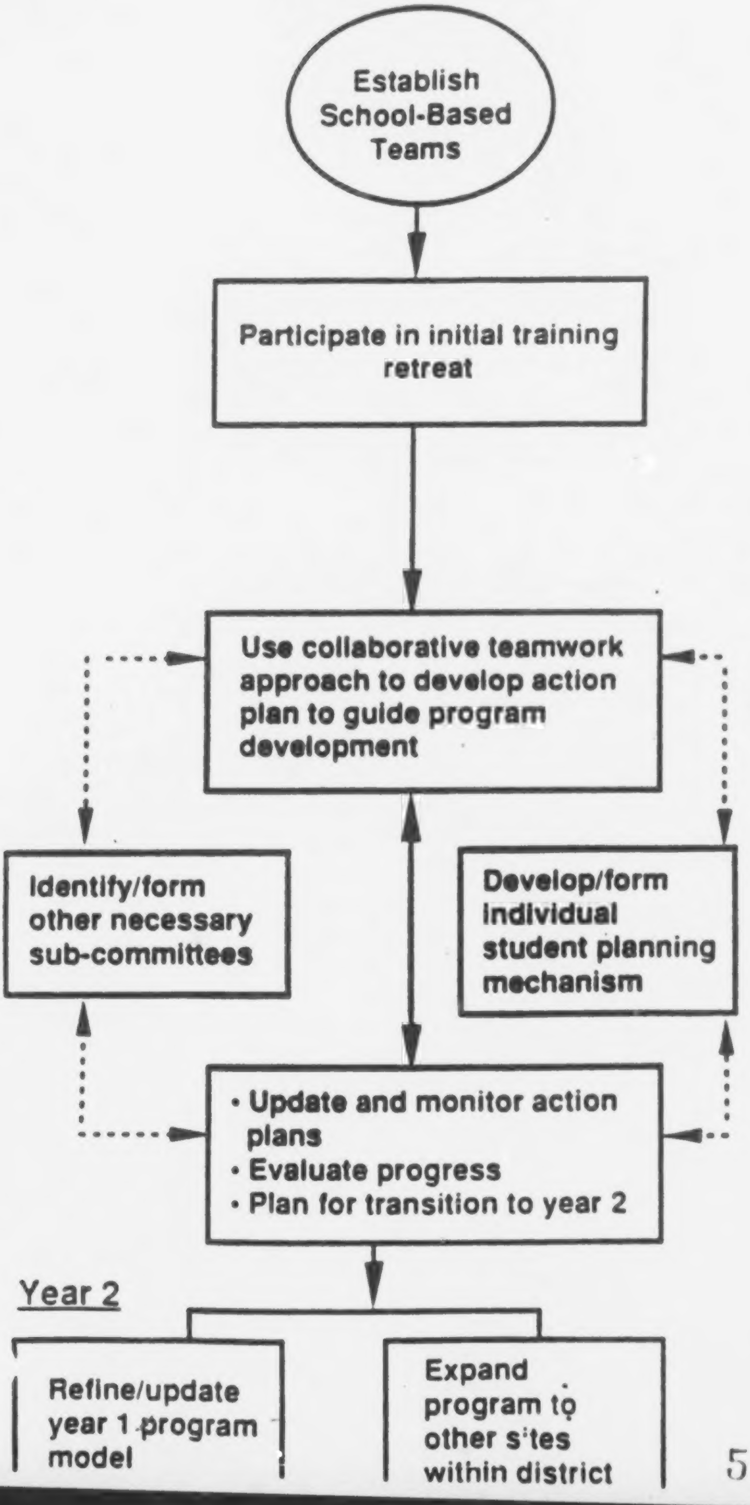
# GATEWAYS
## Program Development Process

Year 1 — Implementation Steps — Intended Outcomes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Refine/update year 1 program model
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- The best preparation for adult life in a diverse society is education in a diverse classroom.

  Inclusive classrooms can build comfort, confidence, and understanding around human variation.

  Are our classrooms artificially homogeneous?

  Are our students socially inept at being with people who have some type of difference?

  Are our students growing up with a narrow definition of "who is okay?"

- Inclusive schools can assist in the development of future citizens who value people --regardless of learning, physical or emotional characteristics.

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Inclusive Education Project;
Syracuse University

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**(Many are used in combination)**

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# Overheads for Session
# 5

# Inclusion

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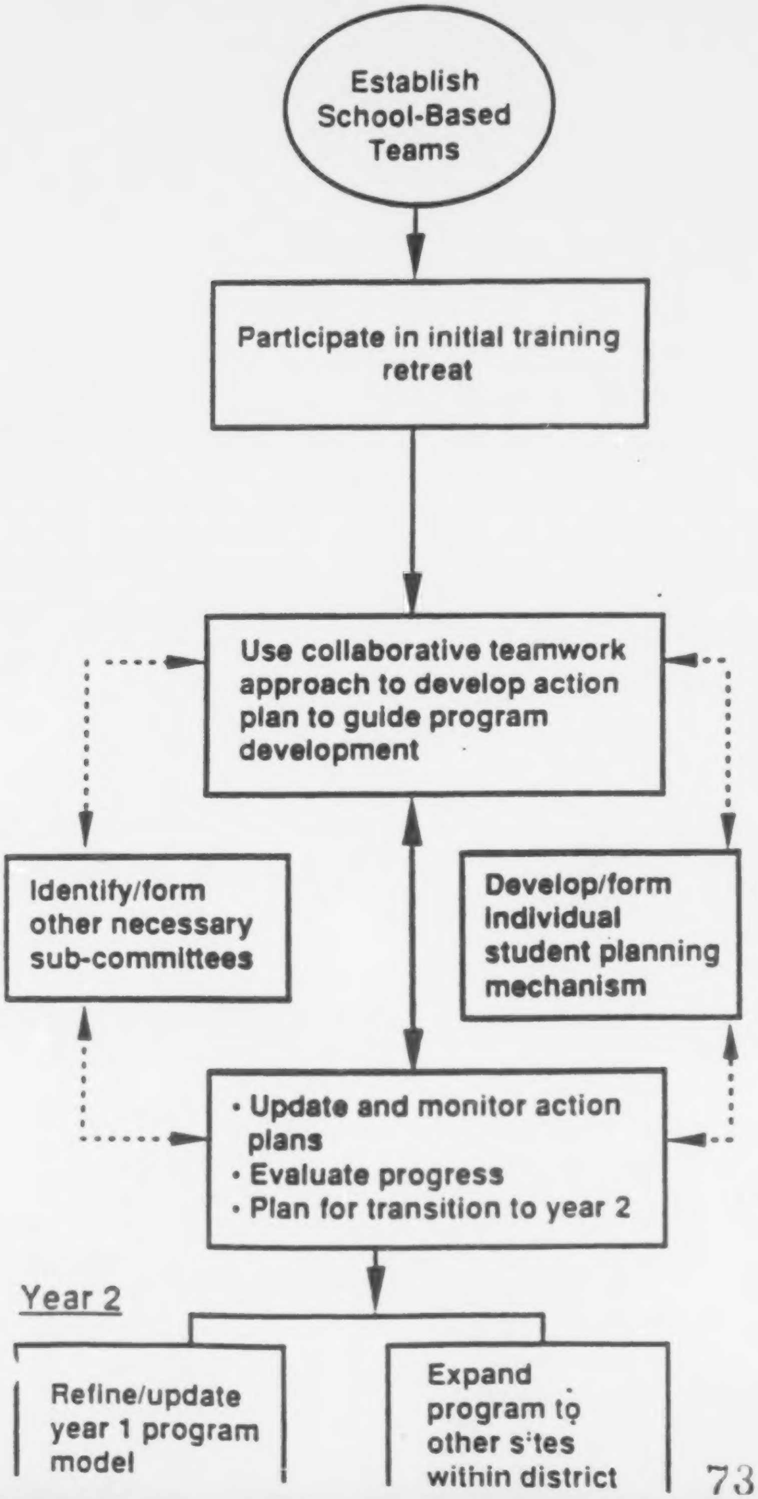
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# SESSION 6

**(1:00 - 2:30)**
(Principals and IST Consultants)
(Small Group)

# THE CHANGE GAME: Year 1

These next two sessions will provide participants an opportunity to examine the influence change brings to the school community. Using a game format, they will become aware of numerous factors that must be considered when instituting new programs.

**GOALS FOR THIS SESSION:** Participants will gain an understanding of the numerous factors that can be encountered when attempting to bring about change in an educational environment. They should recognize the importance of planning and collaboration in this process.

## FACILITATOR'S DIRECTIONS:

### THE CHANGE PROCESS - LECTURETTE

A. Discuss the following assumptions about change.

1. **Change is a process, not an event.** It occurs over a period of time, and does not happen in one year. **Change will take about 3-5 years.** You know change has occurred when the initiative is institutionalized within your school community.

2. **Change is accomplished by individuals.** Change is often thought about in ambiguous, impersonal terms. However, change will affect people, and their role in the process is of utmost importance. Key district and building level people need to be involved from the beginning. Look for staff members who can serve as change agents in this process. Get them involved early.

3. **Change is a highly personal experience and the school community will change at different rates and in varying degrees.**

4. **Change involves developmental growth.** Staff involved in the growth process appear to express and demonstrate growth in terms of feelings and skills. Feelings and skills tend to shift as individuals go through the process.

B. Discuss the Stages of Concern and personal responses at each level:

1. ***Display the Stages of Concern Overhead.*** Ask participants to refer their handout.

2. Ask the participants to consider the question, "When you think of IST, what are you concerned about?"

3. Ask them to locate their position on the stages of change chart as it relates to IST.

4. Tell them they will be progressing through these stages during their involvement in the IST initiative. The PPTM is designed to guide principals through the early stages of implementation and the change process.

**THE CHANGE GAME:**

1. Participants will be divided into groups not to exceed 15.
2. Each group will be given "MAKING CHANGE" game packets.
3. Consultants will guide them through the instructions for "THE CHANGE GAME" and facilitate the progression of the game.
4. Working as a team, participants will function as a "change committee" learning to manage change in school settings.

**MATERIALS: MAKING CHANGE game packets**
**Change handouts**
**Transparencies: Old/young woman**
**Stages of Concern**
**Handouts: Stages of Concern**

# Handouts for Session 6

**Figure 3.1. Stages of Concern: Typical Expressions of Concern about the Innovation**

| | Stages of Concern | Expressions of Concern |
|---|---|---|
| IMPACT | 6 Refocusing | I have some ideas about something that would work even better. |
| | 5 Collaboration | I am concerned about relating what I am doing with what other instructors are doing. |
| | 4 Consequence | How is my use affecting kids? |
| TASK | 3 Management | I seem to be spending all my time getting material ready. |
| SELF | 2 Personal | How will using it affect me? |
| | 1 Informational | I would like to know more about it. |
| | 0 Awareness | I am not concerned about it (the innovation). |

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## *Playing the Game:*
## PLAYER INSTRUCTIONS

### *Object of the Game*

Your team represents the Equity Committee of the Verifine School District. You've formed this committee to plan and implement efforts to insure educational equity for all students. The team is made up of teachers, parents of students, and other staff. You have two years to accomplish these two goals:

- To win over other educators and parents to support and implement equity in their work.
- To make changes that will benefit students.

Your challenge is twofold:

- To move the key people in the district toward Routine Use of equity in their work.
- To accumulate *StuBens*, indicating student benefits.

Because this is a simulation based on real life, there is no final point or end to the game.

### *The District*

The Verifine School District includes a central administration and school board, a K-8 school, and a 9-12 high school. It is a district that is average in terms of its test scores, socio-economic status, and number of students receiving special services.

The staff and parents of the school district are the people described on the set of *People Cards*. Central administration is represented by two school board members, a superintendent, and an assistant superintendent. The K-8 school includes a principal, teachers, and a parent. The high school is represented by a principal, an assistant principal, teachers, other staff, and a parent. You are given background information on each of these people to help you select individuals for various activities. Your selections will often influence the success of your activities.

### *The Gameboard*

The people described on the *People Cards* are listed on the gameboard as administration, K-8 school, and high school. Each person is represented by a *Player Piece*, which you move through the stages on the board labeled: Information, Interest, Preparation, Early Use, and Routine Use. Skip over the shaded spaces on the board.

### *The Play*

You have been given an *Activities Sheet* that represents all the possible moves in this game. Some of the activities are gathering information, talking to staff, making presentations, conducting workshops, revising curriculum. Working as a committee, you must choose one activity for each move: you may only conduct one activity at a time. You may conduct the activities in any order you wish, although five designated activities may only be done in Year Two.

As you discuss your possible activity choices, you should read the description carefully to make sure you understand what it entails. Then decide, as you would in real life, what your best tactic

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would be. You will notice that each move, or activity, costs *Bits* which represent the resources available to you. You have 42 *Bits* to spend each year.

When your team has decided on an activity, the activity, the persons designated for the activity (if needed), and their stages on the board must be recorded on the *Strategy Record Sheet*. For example, if your team chooses Talk To as your first activity, you will choose three persons to Talk To by checking their names and stages on the *Strategy Record Sheet*. Then you will bring the *Strategy Record Sheet* with two *Bits* to the monitor. The monitor will give you feedback describing the results of your activity. Share the results with the rest of your team, and record them on the *Strategy Record Sheet*. The *Feedback Cards* you get from the monitor will tell you how far to move the pieces on the board. Then, decide on your next move.

The *Feedback Cards* you get from the monitor tell you how successful you have been with the activity, and may contain information that will help you to be more effective. All of the results you experience are based on the findings from 15 years of research and practice in helping schools to improve; we have also built in an element of chance. Sometimes, if you have chosen activities wisely, you will be told to move a designated individual on the board a certain number of spaces, and/or you will win *StuBens* (student benefits). When you get *StuBens*, record them in the column on the *Strategy Record Sheet* so you can tally them at the end of the game.

## *To Begin*

- Read about the people in the Verifine School District on the *People Cards*.
- Decide on an activity as your first move, and choose the designated persons, if appropriate.
- Write down your move on the *Strategy Record Sheet*.
- Count out the number of *Bits* required.
- Take both your *Strategy Record Sheet* and the *Bits* to the monitor.
- Bring the *Feedback Card* from the monitor back to your team.
- Discuss and record the information you get.
- Choose your next activity/move.
- Return the *Feedback Card* to the monitor.

## *Time*

The time will be divided into two segments to represent two school years. The monitor will signal when the first year ends.

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## *Playing the Game:*
# ACTIVITIES SHEET

As a team, decide which activities will best promote equity in your school district. Each activity below is a separate move; you can only make one activity move each time. You can repeat any activity, except Diagnosis of District and Social Information.

## YEAR 1 AND YEAR 2

**DIAGNOSIS OF DISTRICT** – assessment information from district files.
*Cost: 2 Bits*

**SOCIAL INFORMATION** – the informal relationship patterns of people in the district.
*Cost: 1 Bit*

**TALK TO** – your first conversation with individual people to introduce equity issues. Choose 3 people.
*Cost: 2 Bits*

**TALK TO AGAIN** – a follow-up conversation to further discuss their concerns. Choose 3 people.
*Cost: 2 Bits*

**WRITTEN INFORMATION** – a short handout or brochure about equity and the Equity Committee, distributed to all district staff.
*Cost: 2 Bits*

**PRESENTATION** – a short presentation to the district about the equity project.
*Cost: 2 Bits*

**WORKSHOP: EQUITY ACTIVITIES FOR YOUR CLASSROOM** – training that provides "hands-on" activities to increase equity in the classroom. Choose 5 people in one school (can include parent) to attend.
*Cost: 5 Bits*

**SEMINAR: EQUITY ISSUES AND HUMAN DEVELOPMENT** – training to encourage group discussion of equity in relation to students' stages of development. Designate 5 people in one school (can include parent) to attend.
*Cost: 6 Bits*

**MATERIALS DISPLAY** – an activity to share new resource materials for classroom use. Designate whether Materials Display is in the elementary or secondary building.
*Cost: 2 Bits*

**CLASSROOM LESSON** – teachers conduct equity lessons in their classrooms. Choose 3 people in Early or Routine Use stages on the gameboard.
*Cost: 2 Bits*

**FOLLOW-UP HELP** – a conversation to help teachers solve problems with a Classroom Lesson. Choose 3 people.
*Cost: 1 Bit*

## YEAR 2 ONLY

**FILM FAIR** – a student-sponsored event involving students from several classes. Designate whether Film Fair is for elementary or secondary school.
*Cost: 6 Bits*

**THEME CELEBRATION** – district-wide event involving activities in all classes, guest speakers, and assemblies.
*Cost: 8 Bits*

**SUPPORT GROUP** – a group of supporters who meet regularly to help one another. Choose 5 people.
*Cost: 4 Bits*

**CURRICULUM REVISION** – revision of district curriculum to integrate new material into it. Form a committee of 5.
*Cost: 8 Bits*

**POLICY IMPLEMENTATION** – mechanisms to implement district equity policy so that the district becomes equitable in all aspects. Form a committee of 5.
*Cost: 8 Bits.*

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*Playing the Game:*

# STRATEGY RECORD SHEET

| | | YEAR 1 AND YEAR 2 ACTIVITIES | | | | | | | | | YEAR 2 ACTIVITIES | | | | | PLAYER PHASES | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | TALK TO | TALK TO AGAIN | WRITTEN INFORMATION | PRESENTATION | WORKSHOP | SEMINAR | MATERIALS DISPLAY | CLASSROOM LESSON | FOLLOW-UP HELP | FILM FAIR | THEME CELEBRATION | SUPPORT GROUP | CURRICULUM REVISION | POLICY IMPLEMENTATION | INFORMATION | INTEREST | PREPARATION | EARLY USE | ROUTINE USE | STUBENS | | | |
| | DISTRICT | | | | | | | | | | | | | | | | | | | | | | | |
| | ELEMENTARY | | | | | | | | | | | | | | | | | | | | | | | |
| | HIGH SCHOOL | | | | | | | | | | | | | | | | | | | | | | | |
| ADMIN. | AL | | | | | | | | | | | | | | | | | | | | | | | |
| | BETH | | | | | | | | | | | | | | | | | | | | | | | |
| | CAROL | | | | | | | | | | | | | | | | | | | | | | | |
| | DAVE | | | | | | | | | | | | | | | | | | | | | | | |
| ELEMENTARY | EVE | | | | | | | | | | | | | | | | | | | | | | | |
| | FERN | | | | | | | | | | | | | | | | | | | | | | | |
| | GARY | | | | | | | | | | | | | | | | | | | | | | | |
| | HAZEL | | | | | | | | | | | | | | | | | | | | | | | |
| | IRENE | | | | | | | | | | | | | | | | | | | | | | | |
| | JAN | | | | | | | | | | | | | | | | | | | | | | | |
| | KEN | | | | | | | | | | | | | | | | | | | | | | | |
| | LORA | | | | | | | | | | | | | | | | | | | | | | | |
| | MIA | | | | | | | | | | | | | | | | | | | | | | | |
| | NORA | | | | | | | | | | | | | | | | | | | | | | | |
| HIGH SCHOOL | OWEN | | | | | | | | | | | | | | | | | | | | | | | |
| | PAT | | | | | | | | | | | | | | | | | | | | | | | |
| | Q.T. | | | | | | | | | | | | | | | | | | | | | | | |
| | RAY | | | | | | | | | | | | | | | | | | | | | | | |
| | SIMONE | | | | | | | | | | | | | | | | | | | | | | | |
| | THELMA | | | | | | | | | | | | | | | | | | | | | | | |
| | UPTON | | | | | | | | | | | | | | | | | | | | | | | |
| | VELMA | | | | | | | | | | | | | | | | | | | | | | | |
| | WILL | | | | | | | | | | | | | | | | | | | | | | | |
| | XAVIER | | | | | | | | | | | | | | | | | | | | | | | |

____ DIAGNOSIS OF DISTRICT

____ SOCIAL INFORMATION

TOTAL YEAR 1:

TOTAL YEAR 1 AND 2:

## *Learning from the Game:*
# STAGES OF CONCERN

## Typical Expressions of Concern About an Innovation

| STAGES OF CONCERN | EXPRESSIONS OF CONCERN |
|---|---|
| **6. REFOCUSING** | I have some ideas about something that would work even better. |
| **5. COLLABORATION** | How can I relate what I am doing to what others are doing? |
| **4. CONSEQUENCE** | How is my use affecting kids? How can I refine it to have more impact? |
| **3. MANAGEMENT** | I seem to be spending all my time getting materials ready. |
| **2. PERSONAL** | How will using it affect me? |
| **1. INFORMATIONAL** | I would like to know more about it. |
| **0. AWARENESS** | I am not concerned about it. |

Adapted from: Shirley M. Hord, William L. Rutherford, Leslie Huling-Austin, and Gene E. Hall. *Taking Charge of Change.* Alexandria, VA: ASCD and Austin, TX: SEDL, 1987.

## *Learning from the Game:*

# LEVELS OF USE OF THE INNOVATION

## Typical Behaviors

| LEVELS OF USE | BEHAVIORAL INDICES OF LEVEL |
|---|---|
| VI. RENEWAL | The user is seeking more effective alternatives to the established use of the innovation. |
| V. INTEGRATION | The user is making deliberate efforts to coordinate with others in using the innovation. |
| IVB. REFINEMENT | The user is making changes to increase outcomes. |
| IVA. ROUTINE | The user is making few or no changes and has an established pattern of use. |
| III. MECHANICAL | The user is using the innovation in a poorly coordinated manner and is making user-oriented change. |
| II. PREPARATION | The user is preparing to use the innovation. |
| I. ORIENTATION | The user is seeking out information about the innovation. |
| 0. NONUSE | No action is being taken with respect to the innovation. |

CBAM Project
Research and Development Center for Teacher Education
The University of Texas

*Learning from the Game:*

# ASSUMPTIONS OF THE CONCERNS BASED ADOPTION MODEL (CBAM)

## CHANGE:

- *is a PROCESS, not an event*
- *is made by INDIVIDUALS first, then institutions*
- *is a highly PERSONAL experience*
- *entails DEVELOPMENTAL growth in feelings and skills*

## INTERVENTIONS MUST BE RELATED TO:

- *the PEOPLE first*
- *the INNOVATION second*

## *Learning the Game:*
## ADOPTER TYPES

The people described in *Making Change* conform to a set of adopter types developed by Everett Rogers and others who have studied how an innovation diffuses through a group of people. The research on diffusion, conducted first among agricultural extension agents and farmers, later among educators in schools, found that people differ in their readiness to accept a change. Some people will adopt the change quickly; others will take a long time.

*Making Change* includes people of all adopter types, in percentages close to those found in the population at large. Of course, a particular school may not be representative of the population at large. It may include more people of one category or another. This game gives you a sample.

- *INNOVATOR:* eager to try new ideas, open to change, and willing to take risks; usually perceived as naive or a little crazy and, therefore, not well integrated into the social structure (8% – Gary, Mia)

- *LEADER:* open to change, but more thoughtful about getting involved; trusted by other staff and sought for advice and opinions (17% – Eve, Jan, Nora, Upton)

- *EARLY MAJORITY:* cautious and deliberate about deciding to adopt an innovation; tends to be a follower, not a leader (29% – Beth, David, Lora, Owen, Thelma, Velma, Xavier)

- *LATE MAJORITY:* skeptical of adopting new ideas and "set in their ways;" can be won over by a combination of peer pressure and administrative expectations (29% – Al, Fern, Hazel, Ken, Q.T., Ray, Simone)

- *RESISTER:* suspicious and generally opposed to new ideas; usually low in influence and often isolated from the mainstream (17% – Carol, Irene, Pat, Will)

Adapted from Rogers, Everett, *Diffusion of Innovations*, New York, NY, The Free Press, 1971.

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## *Learning from the Game:*

# LEARNINGS BUILT INTO *MAKING CHANGE*

1. *Change takes time and persistence.*
2. *Individuals go through stages in the change process and have different needs at different stages.*
3. *Change strategies are most effective when they are chosen to meet people's needs.*
4. *Administrative support and approval is needed for change to occur.*
5. *Developing a critical mass of support is just as important as developing administrative support.*
6. *An individual or committee must take responsibility for organizing and managing the change.*
7. *The objective is to benefit students, not just "convert" staff.*
8. *Successful change is PLANNED and MANAGED.*

# Suggestions for dealing with change

- Make sure you have a clear understanding of your own paradigms
- Ask yourself, "Who in another field would be interested in my unresolved problems?" and then go talk to them
- Whenever a change is suggested, work through both the negative and the positive aspects of the change
- Actively seek your own paradigm shifts by getting outside your field regularly

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# Rejection Excuses

- Anxiety - I'm afraid I can't do it
- Loss of power
- Anger over having your expertise made irrelevant
- Jealously because someone is better at the new way than I am

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# Issues in the Design of Schooling: Changing the Paradigm

Robert K. Branson
Contributing Editor

This article addresses fundamental issues central to the systematic design of schooling. As we approach watershed decisions about educational improvement and reform from Presidential summits and study commissions, it is critical to remember that we should be planning the future and not the past. That is, we should be applying research-based principles of education design and operation in the context of a fast-developing technology. This is a totally different perspective from those presented in traditional commission recommendations.

In the March 1990 issue of this magazine, I reviewed a report by Firestone, Fuhrman, and Kirst (1989) that evaluates reforms recommended by national study commissions. The results of reforms, in six selected states, detailed in that report provided evidence that the traditional reforms recommended had little measurable impact on student performance. Accordingly, these results provide the basis for the assumptions used in this article.

The existing structure of schools evolved over a long period of time, was based on speculations about the nature of learning, and adopted the roles of teachers and students from the oral tradition. The current model of schooling was never *designed*. When today's schooling paradigm was put in place, little empirical knowledge about the learning process had been published, human knowledge was relatively limited, and there was an implicit trust in the authoritarian approach that was patterned on church ritual.

This article is intended to stimulate thought about how schooling should be conducted, based on (but not limited to) what is known about learning, interpersonal interactions, child development, and governance, in the context of advances in hardware, software, and courseware technology.

Banathy's (1987) "Outside-in" model provides an excellent basis to begin a systems approach. We should start with the problem, then define the mission. When the mission is clear, alternative solutions will be considered.

## Issues in the Design of Schooling

Two general approaches have been offered to making fundamental improvements in educational outcomes in the United States: (1) patching up or adding to the existing establishment such as reducing class sizes, lengthening school days and years, adding requirements to preservice teacher education programs, and increasing graduation requirements (Firestone, Fuhrman, and Kirst, 1989); or, (2) *designing* a completely new model of schooling.

The first, traditional solution will be expensive and will yield little overall improvement since its real productivity now approaches asymptotic performance (see Branson, 1988). The second approach integrates theory, empirical research, and established best practice to address issues from a design perspective and produce models that may have little resemblance to existing schools (see Riegeluth, 1988).

The dilemma lies in the fact that traditional fixes, acceptable to the establishment and easy to implement (see Firestone, Fuhrman, and Kirst (1989), cannot yield significant improvements; the unit cost of graduates will increase, but their quality will improve little (Morgan, 1989). The systematic design approach, which incorporates what is known about learning, student servicing, and management, can yield cost-controlled major advancements and can continue to improve. However, it requires fundamental change analogous to changing from manpower and horsepower to steam power. Vested interests within and without the educational establishment will resist that magnitude of change. Even those who embrace new models will find adopting them a problem of immense proportions.

## A Paradigm Shift

Figure 1 presents a conceptualization of the historical development of educational paradigms. In the early days of schooling, instruction was provided according to the oral tradition paradigm in diagram A: The teacher (T) was the focus in which was combined the knowledge (K) and experience (E) bases. Through oral presentations to students, the limited knowledge-base was transmitted. Gradually, the knowledge-base expanded and printed materials became available. The critical issue was that instruction was presented to the student (S) in a one-way delivery. Later, students recited orally, or did written work to be evaluated by the teacher.

Contemporary instruction is represented by paradigm B: The teacher is still the principal source of knowledge and experience and serves as a deliverer of information as well as a gatekeeper and controller of the knowledge base. The model evolved to increase the number of true *interactions* between the student and the teacher. Gradually, improved instruction came to be provided by better instructional materials such as textbooks, workbooks, and audiovisual aids (see Morgan, 1989). *Informal* interactions among students were possible. This model has been in place for more than sixty years and has served the needs of that time relatively well; it does not meet today's needs.

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The immense educational challenge of the future requires a new paradigm. The era has changed. The knowledge-base has increased vastly, the requirements for intellectual activities are increasing, and the performance of the traditional paradigm has declined. In fairness, the traditional paradigm has probably not declined against the requirements of sixty years ago regardless of what the fashionable "education bashers" claim, but it cannot address contemporary needs.

A new paradigm is required that will conform to new design requirements. The design must address *at least* these requirements:

- Improve the self-concept of students.
- Optimize student time-on-task.
- Increase quality and quantity of feedback.
- Improve the quality of instructional materials.
- Improve students' self-management skills.
- Incorporate a performance-based progression system.
- Design courseware to integrate curriculum with and across content domains.
- Pace instruction according to students' capabilities.
- Accumulate improvements through evaluation and revision.

These design features will increase both the quality and quantity of interactions between the students and the knowledge and experience bases. The *rate* of information processing will increase. The distribution of information from a single source at a constant rate of delivery (as in paradigm B) will no longer permit students to acquire the knowledge-base in a timely manner.

## A New Paradigm

One approach is the technology-based paradigm presented in diagram C. It represents a fully interactive, mixed initiative process of instruction. There, each S interacts with T, the database and expert system, the intelligent tutor, and *formally* with other students. S may now learn directly from the database and expert, or from other Ss, without T first *presenting* the instruction. T and S can interact with each other or with the database and expert, or both. For the student to be able to interact with the expert, there must first be one. We anticipate that these experts will be developed during the next decade. Ample databases that can be easily accessed and used, however, are now in existence.

Teacher-centered, classroom-controlled instruction is represented in both past and present models. Learner-center, performance-paced instruction, designed for individual students, is represented in the future model. This paradigm shift *must* occur before substantial improvements can be made and retained. The foremost reason that a technologically-based environment is critical is that it is *incrementally improvable*, and the improvements accumulate; they do not dissipate as a result of time or staff turnover. When errors are fixed, or upgraded lessons are introduced, the improvements remain in the courseware for further development.

To the fullest extent feasible, the students first experience instruction on the hardware system in the technology-based paradigm. Instructional staff members are prepared to deal with exceptions and problems, not the routine, repetitive presentation of subject matter. To have teachers use a blackboard, or lecture to a class all day, 180 days a year, does not constitute utilizing their creativity to its greatest potential. Teacher presentations are neither time-efficient nor measurably better through time.

## Raising Standards

*A Nation at Risk* recommended increasing graduation requirements, increasing formal educational requirements for teachers, and improving students' academic performance as a means of educational reform. It did not explain *how* teachers and students were to achieve these new standards within the current model. It is counterproductive to increase demands on teachers and students without improving the quality of instruction available to them.

### Research Basis

This article is based on the fundamental assumption that valid knowledge is acquired through empirical research that can be publicly verified. From this research base, and its related theories, come principles that can be applied in a variety of situations. The applications of these principles, as well as the results of their cooperations, can be measured and evaluated objectively according to stringent criteria.

A recent article by Perelman (1989) compared research and development expenditures in education to those in other sectors of the economy. Only social work was seen to be more labor-intensive. Less than 0.0025% of total education budgets go to research and development. No sector of the economy can improve or advance with this level of investment in R & D. While management must bear full responsibility for results in the systems they operate, without new technologies, management cannot make significant improvements.

Research and development *does not mean* moving from one school to another and copying examples of "innovative" programs. There is a basic difference between applying research-based principles and copying examples from one situation to another.

I recognize that experienced practitioners have significant contributions to make. However, years of experience in the application of non-principled practices, no matter how commendable, does not contribute significantly to valid knowledge. Remember that Pasteur totally disrupted the contemporary practice of medicine because he applied the principles discovered in his empirical investigations. The power-sharing and self-governance models used in the hospitals of his day could not improve patient mortality rates so long as they were using the *wrong concept* of disease. While shared decision-making and governance models are necessary conditions to educational improvement, they are not *sufficient* conditions.

Before the development of the germ theory of disease, no matter how proficient a practitioner might have been at

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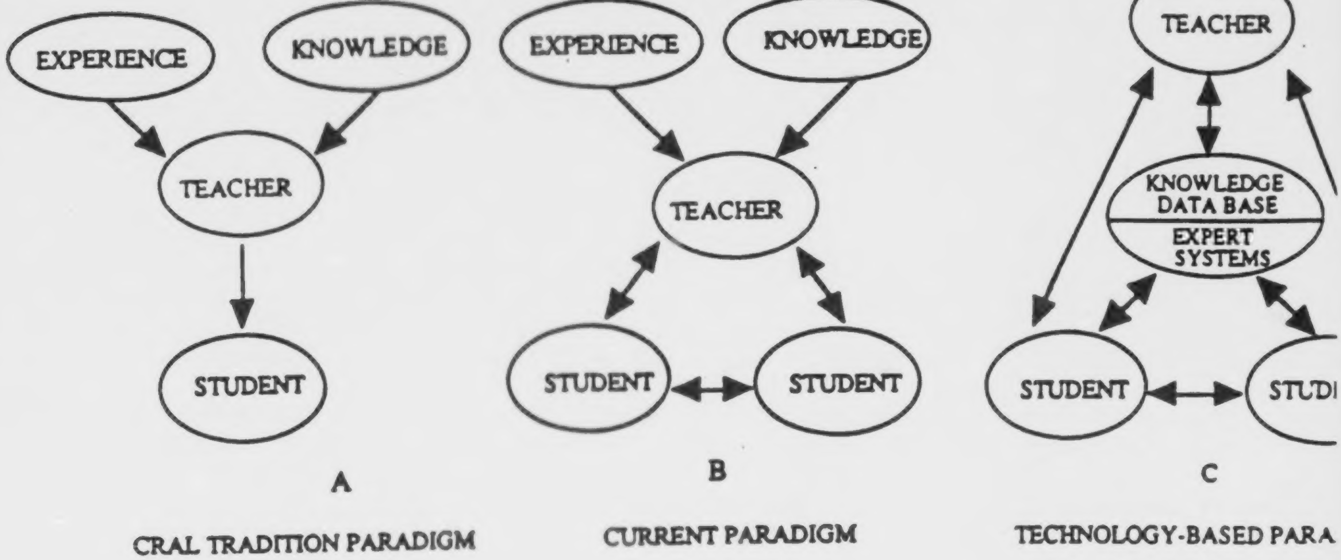
*Figure 1*
*School Models of the Past, Present, and Future*



exhortation or leeching, the fundamental presupposition was in error and people died. With the scientific discovery of microorganisms, the foundation of much of contemporary medicine was established.

The majority of current teaching practice evolved through non-documented and non-accumulative experience, rather than on principled research. Accordingly, there are many false practices and pre-suppositions in vogue. While some instructional materials have been designed according to principles, most existing practices have been in place for more than a hundred years, long before the first experiments on learning were conducted or verifiable principles of instructional design developed.

I believe that there is sufficient valid research data, instructional theory, and organization design literature to enable the design of new systems of schooling. The research-based designs will foster further research, and through that process will reach the criterion of *improvability*. Operating data will be systematically obtained and used as the basis for making future improvements. To be improvable, systems must accumulate critical operating data and use that data to make planned revisions. This collective institutional memory will be documented in literature available to future practitioners.

A significant amount of existing prior research will not be useful in the design of new models. I speak of the kind of research aimed at making small changes in how teachers teach, or observing teachers in classrooms. Teachers already teach as well as they do--or will--know how. Observational research presupposed Paradigm B; it will not generalize to technology-based models. Conversely, research on information processing, cognitive models, peer interactions, collaborative learning, and many other topics will find its way into designs of new models.

## Conclusion

In closing, I suggest that if we continue to ask "How can we get teachers to use computers in their classrooms?" we will have made a fatal error and will make little improvement. "How can technology be used to make fundamental improvements in education?" is a more appropriate question. Progress will be very limited if we continue to assume that we *must* use the current teacher delivered model. Only when we reformulate the question can true progress be made.

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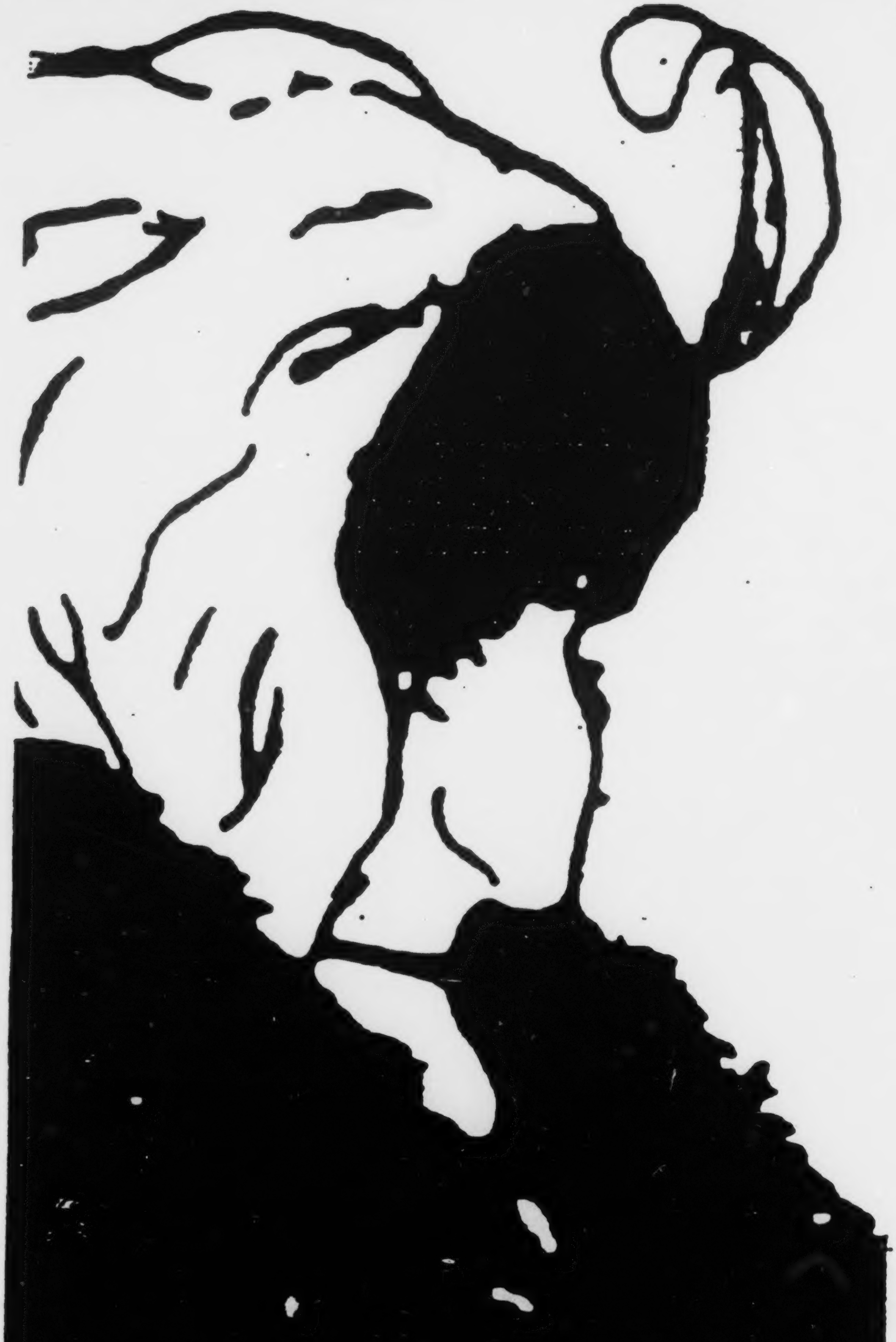
# Overhead for Session 6

Overhead

II :



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### *Playing the Game:*

## PLAYER INSTRUCTIONS

### *Object of the Game*

Your team represents the Equity Committee of the Verifine School District. You've formed this committee to plan and implement efforts to insure educational equity for all students. The team is made up of teachers, parents of students, and other staff. You have two years to accomplish these two goals:

- To win over other educators and parents to support and implement equity in their work.
- To make changes that will benefit students.

Your challenge is twofold:

- To move the key people in the district toward Routine Use of equity in their work.
- To accumulate *StuBens*, indicating student benefits.

Because this is a simulation based on real life, there is no final point or end to the game.

### *The District*

The Verifine School District includes a central administration and school board, a K-8 school, and a 9-12 high school. It is a district that is average in terms of its test scores, socio-economic status, and number of students receiving special services.

The staff and parents of the school district are the people described on the set of *People Cards*. Central administration is represented by two school board members, a superintendent, and an assistant superintendent. The K-8 school includes a principal, teachers, and a parent. The high school is represented by a principal, an assistant principal, teachers, other staff, and a parent. You are given background information on each of these people to help you select individuals for various activities. Your selections will often influence the success of your activities.

### *The Gameboard*

The people described on the *People Cards* are listed on the gameboard as administration, K-8 school, and high school. Each person is represented by a *Player Piece*, which you move through the stages on the board labeled: Information, Interest, Preparation, Early Use, and Routine Use. Skip over the shaded spaces on the board.

### *The Play*

You have been given an *Activities Sheet* that represents all the possible moves in this game. Some of the activities are gathering information, talking to staff, making presentations, conducting workshops, revising curriculum. Working as a committee, you must choose one activity for each move: you may only conduct one activity at a time. You may conduct the activities in any order you wish, although five designated activities may only be done in Year Two.

As you discuss your possible activity choices, you should read the description carefully to make sure you understand what it entails. Then decide, as you would in real life, what your best tactic

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would be. You will notice that each move, or activity, costs *Bits* which represent the resources available to you. You have 42 *Bits* to spend each year.

When your team has decided on an activity, the activity, the persons designated for the activity (if needed), and their stages on the board must be recorded on the *Strategy Record Sheet*. For example, if your team chooses Talk To as your first activity, you will choose three persons to Talk To by checking their names and stages on the *Strategy Record Sheet*. Then you will bring the *Strategy Record Sheet* with two *Bits* to the monitor. The monitor will give you feedback describing the results of your activity. Share the results with the rest of your team, and record them on the *Strategy Record Sheet*. The *Feedback Cards* you get from the monitor will tell you how far to move the pieces on the board. Then, decide on your next move.

The *Feedback Cards* you get from the monitor tell you how successful you have been with the activity, and may contain information that will help you to be more effective. All of the results you experience are based on the findings from 15 years of research and practice in helping schools to improve; we have also built in an element of chance. Sometimes, if you have chosen activities wisely, you will be told to move a designated individual on the board a certain number of spaces, and/or you will win *StuBens* (student benefits). When you get *StuBens*, record them in the column on the *Strategy Record Sheet* so you can tally them at the end of the game.

### *To Begin*

- Read about the people in the Verifine School District on the *People Cards*.
- Decide on an activity as your first move, and choose the designated persons, if appropriate.
- Write down your move on the *Strategy Record Sheet*.
- Count out the number of *Bits* required.
- Take both your *Strategy Record Sheet* and the *Bits* to the monitor.
- Bring the *Feedback Card* from the monitor back to your team.
- Discuss and record the information you get.
- Choose your next activity/move.
- Return the *Feedback Card* to the monitor.

### *Time*

The time will be divided into two segments to represent two school years. The monitor will signal when the first year ends.

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## *Playing the Game:*

## ACTIVITIES SHEET

As a team, decide which activities will best promote equity in your school district. Each activity below is a separate move; you can only make one activity move each time. You can repeat any activity, except Diagnosis of District and Social Information.

### YEAR 1 AND YEAR 2

**DIAGNOSIS OF DISTRICT** – assessment information from district files.
*Cost: 2 Bits*

**SOCIAL INFORMATION** – the informal relationship patterns of people in the district.
*Cost: 1 Bit*

**TALK TO** – your first conversation with individual people to introduce equity issues. Choose 3 people.
*Cost: 2 Bits*

**TALK TO AGAIN** – a follow-up conversation to further discuss their concerns. Choose 3 people.
*Cost: 2 Bits*

**WRITTEN INFORMATION** – a short handout or brochure about equity and the Equity Committee, distributed to all district staff.
*Cost: 2 Bits*

**PRESENTATION** – a short presentation to the district about the equity project.
*Cost: 2 Bits*

**WORKSHOP: EQUITY ACTIVITIES FOR YOUR CLASSROOM** – training that provides "hands-on" activities to increase equity in the classroom. Choose 5 people in one school (can include parent) to attend.
*Cost: 5 Bits*

**SEMINAR: EQUITY ISSUES AND HUMAN DEVELOPMENT** – training to encourage group discussion of equity in relation to students' stages of development. Designate 5 people in one school (can include parent) to attend.
*Cost: 6 Bits*

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*Cost: 2 Bits*

**CLASSROOM LESSON** – teachers conduct equity lessons in their classrooms. Choose 3 people in Early or Routine Use stages on the gameboard.
*Cost: 2 Bits*

**FOLLOW-UP HELP** – a conversation to help teachers solve problems with a Classroom Lesson. Choose 3 people.
*Cost: 1 Bit*

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### YEAR 2 ONLY

**FILM FAIR** – a student-sponsored event involving students from several classes. Designate whether Film Fair is for elementary or secondary school.
*Cost: 6 Bits*

**THEME CELEBRATION** – district-wide event involving activities in all classes, guest speakers, and assemblies.
*Cost: 8 Bits*

**SUPPORT GROUP** – a group of supporters who meet regularly to help one another. Choose 5 people.
*Cost: 4 Bits*

**CURRICULUM REVISION** – revision of district curriculum to integrate new material into it. Form a committee of 5.
*Cost: 8 Bits*

**POLICY IMPLEMENTATION** – mechanisms to implement district equity policy so that the district becomes equitable in all aspects. Form a committee of 5.
*Cost: 8 Bits.*

*Playing the Game:*

## STRATEGY RECORD SHEET

| | | YEAR 1 AND YEAR 2 ACTIVITIES | | | | | | | | | YEAR 2 ACTIVITIES | | | | | PLAYER PHASES | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | TALK TO | TALK TO AGAIN | WRITTEN INFORMATION | PRESENTATION | WORKSHOP | SEMINAR | MATERIALS DISPLAY | CLASSROOM LESSON | FOLLOW-UP HELP | FILM FAIR | THEME CELEBRATION | SUPPORT GROUP | CURRICULUM REVISION | POLICY IMPLEMENTATION | INFORMATION | INTEREST | PREPARATION | EARLY USE | ROUTINE USE | STUBENS | | | |
| | DISTRICT | | | | | | | | | | | | | | | | | | | | | | | |
| | ELEMENTARY | | | | | | | | | | | | | | | | | | | | | | | |
| | HIGH SCHOOL | | | | | | | | | | | | | | | | | | | | | | | |
| ADMIN. | AL | | | | | | | | | | | | | | | | | | | | | | | |
| | BETH | | | | | | | | | | | | | | | | | | | | | | | |
| | CAROL | | | | | | | | | | | | | | | | | | | | | | | |
| | DAVE | | | | | | | | | | | | | | | | | | | | | | | |
| ELEMENTARY | EVE | | | | | | | | | | | | | | | | | | | | | | | |
| | FERN | | | | | | | | | | | | | | | | | | | | | | | |
| | GARY | | | | | | | | | | | | | | | | | | | | | | | |
| | HAZEL | | | | | | | | | | | | | | | | | | | | | | | |
| | IRENE | | | | | | | | | | | | | | | | | | | | | | | |
| | JAN | | | | | | | | | | | | | | | | | | | | | | | |
| | KEN | | | | | | | | | | | | | | | | | | | | | | | |
| | LORA | | | | | | | | | | | | | | | | | | | | | | | |
| | MIA | | | | | | | | | | | | | | | | | | | | | | | |
| | NORA | | | | | | | | | | | | | | | | | | | | | | | |
| HIGH SCHOOL | OWEN | | | | | | | | | | | | | | | | | | | | | | | |
| | PAT | | | | | | | | | | | | | | | | | | | | | | | |
| | Q.T. | | | | | | | | | | | | | | | | | | | | | | | |
| | RAY | | | | | | | | | | | | | | | | | | | | | | | |
| | SIMONE | | | | | | | | | | | | | | | | | | | | | | | |
| | THELMA | | | | | | | | | | | | | | | | | | | | | | | |
| | UPTON | | | | | | | | | | | | | | | | | | | | | | | |
| | VELMA | | | | | | | | | | | | | | | | | | | | | | | |
| | WILL | | | | | | | | | | | | | | | | | | | | | | | |
| | XAVIER | | | | | | | | | | | | | | | | | | | | | | | |

DIAGNOSIS OF DISTRICT SOCIAL INFORMATION TOTAL YEAR 1:

# *Learning from the Game:*

# STAGES OF CONCERN

## Typical Expressions of Concern About an Innovation

| STAGES OF CONCERN | EXPRESSIONS OF CONCERN |
|---|---|
| 6. REFOCUSING | I have some ideas about something that would work even better. |
| 5. COLLABORATION | How can I relate what I am doing to what others are doing? |
| 4. CONSEQUENCE | How is my use affecting kids? How can I refine it to have more impact? |
| 3. MANAGEMENT | I seem to be spending all my time getting materials ready. |
| 2. PERSONAL | How will using it affect me? |
| 1. INFORMATIONAL | I would like to know more about it. |
| 0. AWARENESS | I am not concerned about it. |

Adapted from: Shirley M. Hord, William L. Rutherford, Leslie Huling-Austin, and Gene E. Hall. *Taking Charge of Change*. Alexandria, VA: ASCD and Austin, TX: SEDL, 1987.

## *Learning from the Game:*

# LEVELS OF USE OF THE INNOVATION

### Typical Behaviors

| LEVELS OF USE | BEHAVIORAL INDICES OF LEVEL |
|---|---|
| VI. RENEWAL | The user is seeking more effective alternatives to the established use of the innovation. |
| V. INTEGRATION | The user is making deliberate efforts to coordinate with others in using the innovation. |
| IVB. REFINEMENT | The user is making changes to increase outcomes. |
| IVA. ROUTINE | The user is making few or no changes and has an established pattern of use. |
| III. MECHANICAL | The user is using the innovation in a poorly coordinated manner and is making user-oriented change. |
| II. PREPARATION | The user is preparing to use the innovation. |
| I. ORIENTATION | The user is seeking out information about the innovation. |
| 0. NONUSE | No action is being taken with respect to the innovation. |

CBAM Project
Research and Development Center for Teacher Education
The University of Texas

*Learning from the Game:*

# ASSUMPTIONS OF THE CONCERNS BASED ADOPTION MODEL (CBAM)

**CHANGE:**

- *is a PROCESS, not an event*
- *is made by INDIVIDUALS first, then institutions*
- *is a highly PERSONAL experience*
- *entails DEVELOPMENTAL growth in feelings and skills*

**INTERVENTIONS MUST BE RELATED TO:**

- *the PEOPLE first*
- *the INNOVATION second*

## *Learning the Game:*
## ADOPTER TYPES

The people described in *Making Change* conform to a set of adopter types developed by Everett Rogers and others who have studied how an innovation diffuses through a group of people. The research on diffusion, conducted first among agricultural extension agents and farmers, later among educators in schools, found that people differ in their readiness to accept a change. Some people will adopt the change quickly; others will take a long time.

*Making Change* includes people of all adopter types, in percentages close to those found in the population at large. Of course, a particular school may not be representative of the population at large. It may include more people of one category or another. This game gives you a sample.

- ***INNOVATOR:*** eager to try new ideas, open to change, and willing to take risks; usually perceived as naive or a little crazy and, therefore, not well integrated into the social structure (8% – Gary, Mia)

- ***LEADER:*** open to change, but more thoughtful about getting involved; trusted by other staff and sought for advice and opinions (17% – Eve, Jan, Nora, Upton)

- ***EARLY MAJORITY:*** cautious and deliberate about deciding to adopt an innovation; tends to be a follower, not a leader (29% – Beth, David, Lora, Owen, Thelma, Velma, Xavier)

- ***LATE MAJORITY:*** skeptical of adopting new ideas and "set in their ways;" can be won over by a combination of peer pressure and administrative expectations (29% – Al, Fern, Hazel, Ken, Q.T., Ray, Simone)

- ***RESISTER:*** suspicious and generally opposed to new ideas; usually low in influence and often isolated from the mainstream (17% – Carol, Irene, Pat, Will)

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Adapted from Rogers, Everett. *Diffusion of Innovations*. New York, NY. The Free Press. 1971.

## *Learning from the Game:*
## LEARNINGS BUILT INTO *MAKING CHANGE*

1. *Change takes time and persistence.*

2. *Individuals go through stages in the change process and have different needs at different stages.*

3. *Change strategies are most effective when they are chosen to meet people's needs.*

4. *Administrative support and approval is needed for change to occur.*

5. *Developing a critical mass of support is just as important as developing administrative support.*

6. *An individual or committee must take responsibility for organizing and managing the change.*

7. *The objective is to benefit students, not just "convert" staff.*

8. *Successful change is PLANNED and MANAGED.*

## SESSION 7

**(2:45 - 4:00)**
(Principals and IST Consultants)
(Small Group)

## THE CHANGE GAME: Year 2

This is a continuation of the the previous session. Progress in groups will be varied as consensus leads to different strategies. Participants may even begin to compete with other groups attempting to complete the task rather than focusing upon the varied issues which occur when attempting a change. Facilitators should try to de-emphasize the competition and direct attention to the groups' means of collaborating.

## FACILITATOR'S DIRECTIONS:

I. Lead a short discussion regarding problems/issues/people traites that are affecting each team's efforts to implement the change IN YEAR ONE.

II. Make mention of the additional activities available in YEAR TWO.

III. Debriefing (30 minutes)

Using the "Learning from the Game" overhead, lead discussion focusing on the eight points.

***At the end of this session, distribute "Role Play Homework". Instruct group they will be in small group session starting at 9:00 a.m.***

**MATERIALS: MAKING CHANGE game packets**
**Role Play Homework**

# Handouts for Session 7

(Role Play Homework - Session 9)

# HOMEWORK:

## PENN
## ULTIMATE
## SCHOOL
## DISTRICT

**Penn Ultimate School District**
504 School House Lane, Hometown, BN

## DISTRICT BACKGROUND INFORMATION

## SIMULATION ACTIVITY

Penn Ultimate is a school district located in the state of Buchanan. The district is situated near the moderately sized cities of Hometown and Nearby which have diverse populations. These communities have strong industrial bases and stable economies. Because of the proximity of Penn Ultimate School District to the cities of Nearby and Hometown, persons employed in professional and technical positions have chosen to reside in the district and commute for employment. Although Penn Ultimate is near cities, Pennville is the only sizeable community within the district. The remainder of the district is sparsely settled. Most of the minority populations live in Pennville .

Of the children living in two parent families, almost 60% of the children in school come from families in which both parents are employed. Approximately 45% of the children come from families with a single parent. Nearly 30% of the children receive some kind of lunch assistance, either free or reduced cost.

The school district serves 3000 pupils in five school buildings, one high school, one middle school and three elementary schools. The grade organization is K-4-4-4. The district encompasses 80 square miles and 32 busses are used to transport more than 60% of the students to school. Most of the students who do not ride a bus to school come from the community of Pennville. There are active parent groups at all three elementary schools and at the middle school. Parent groups at the high school tend to focus around interest groups (band, athletics, etc.).

The Board of Education has been diligent in maintaining the physical plant in the district. The buildings are in good shape with no major renovations planned. Harrison Middle School is now 12 years old and the community is beginning to overcome the initial resistance to the middle school concept. The idea is now acceptable, but some doubts still linger.

Penn Ultimate is in the second year of a two year contract with its teachers. Past negotiations have been resolved without a major interruption in education services (strike) but the sessions always terminate at the zero hour. Two grievances have been filed within the last year, both dealing with the assignment of handicapped students in regular education classes.

Penn Ultimate High School - 900 students
Harrison Middle School - 950 students
Elementary schools - 1150 students
    McArthur Elementary (385)
    Johnson Elementary (365)
    Moorehead Elementary (400)

## ADMINISTRATIVE STAFF

The Superintendent at Penn Ultimate is Dr. B. R. Robinson who has been in the position for 5 years. Prior to being elected as Superintendent, Dr. Robinson was a secondary principal and a high school teacher. Dr. Robinson is considered to be an effective administrator by the teaching staff and has maintained a good relationship with the community and the Board of School Directors. Dr. Robinson has been recognized as being an innovator and change agent and has made significant improvements to the educational program at Penn Ultimate since becoming superintendent. Most of these changes have come at the secondary level. Dr. Robinson is interested in making schools a good place for children, a positive environment for learning.

The Assistant Superintendent at Penn Ultimate is Dr. Jo Phillips who has been in the position three years. Dr. Phillips is responsible for curriculum and instruction which includes responsibility for pupil personnel services and special education. A research specialist in outlook, Dr. Phillips supports sound educational practices so long as they can be supported by research. Dr. Phillips is knowledgeable about state level programs and is proud that knowledge of state regulations is seen as an asset. Dr. Phillips aspires to be a superintendent and has already been an elementary teacher, a special education teacher, and an elementary principal.

Fran Williams is the Principal at McArthur Elementary School. Fran has been the principal at McArthur for one year and was a principal for four years before coming to McArthur. Fran knows the staff well and is viewed as an aggressive change agent who supports the best practices which have arisen from the effective school research. Fran knows the school community well. There is a strong base of support, particularly from Pennville. Almost half the children in Pennville attend McArthur and they comprise almost 85% of the students at McArthur. The remaining 15% come from the Farside Township, the most isolated area of the district.

The staff at McArthur consists of twenty regular education teachers, one instructional support teacher, two special education teachers (one learning support and one emotional support). Services in art, music, physical education, library, and guidance are provided by itinerant teachers who serve more than one building. The service average in McArthur is 14.4 years and there is a significant division between two groups within the staff. These two groups are comprised of teachers who are age 45+, and soon to reach retirement, and a much younger group of teachers, in terms of teaching experience, who tend to be responsive to new ideas and change. There is significant competition between these two groups.

**Penn Ultimate School District**
504 School House Lane, Hometown, BN

## PERSONNEL ROSTER

Dr. B. R. Robinson, Superintendent

Dr. Jo Phillips, Assistant Superintendent

Lee Carolle, Supervisor of Special Education, Penn Ultimate School District

Terry Tucker, Chapter I Program Coordinator, Penn Ultimate School District

Fran Williams, Principal, McArthur Elementary School

Pat Marshall, Instructional Support Teacher, McArthur Elementary School

Dana Rodgers, Special Education Teacher, McArthur Elementary School

Lou Taylor, Chapter I Reading Specialist, McArthur Elementary School

Jan Jacobs, First Grade Teacher, McArthur Elementary School

# DAY 3

# SESSION 8

**(9:00 - 12:00)**
(Principals Facilitating)
(Small Group)

## "Take Your Pick"

This session will be an opportunity to get more detailed information in one of three topic areas running concurrently.

| | |
|---|---|
| Curriculum Based Assessment (CBA): | Dr. Edward Gickling<br>Special Consultant to the IST Project |
| Effective Interaction Patterns: | Joseph Krueger<br>Positive Behavior Support<br>IST Consultant |
| Computerized IST Data and Information: | Robert Clegg<br>Principal<br>West Bradford Elementary School<br>Downingtown Area School District |

## Notes:

# SESSION 9

**(1:00 - 2:30)**
(Principals Facilitating)
(Small Group)

# OVERVIEW OF ROLE PLAY CONCERNING IST IMPLEMENTATION

This activity has been designed to address some issues which may arise in local districts with the IST process and its implementation. The session begins with a role play which involves personnel from the Penn Ultimate School District who meet to plan the implementation of the IST in the District.

**GOAL FOR THIS SESSION:** Through the role play and subsequent activities and discussions, participants will identify issues dealing with the implementation of IST, recognize paradigms and their impact on the implementation process, and acknowledge the need for a collaborative, consultative process.

# FACILITATOR'S DIRECTIONS

This session is designed to provide participants with a realistic view of the IST process and some of the issues districts likely will experience as the program is implemented. Change requires a shift in paradigms and this activity provides an opportunity for participants and observers to see paradigms in action.

**I. ASSIGN ROLES FOR THE ROLE PLAY (20 minutes)**
Two groups will be enacting the role play at the same time. Select from volunteers or assign two people for each role (18 total participants; nine for each role play). Distribute the role play directions to the individuals in the group who have been chosen to play the roles. Provide time for the role players to read and study their roles.

The remaining session attenders who are not assigned specific roles will be assigned to observe the role play using an observer's checklist.

**II. ROLE PLAY BY PARTICIPANTS (40 minutes)**
Separate the two groups who are acting in the role play and assign observers to each group. There needs to be distance between the groups so that there is not too much interference. You might have one group perform the role play in the session room and the other perform in the hallway just outside the room. Move from group to group to observe the process.

**III. SMALL GROUP DEBRIEFING (20 minutes)**
Draw the role play activities to a conclusion. Each role play group and observers assigned to the group should discuss what happened during the role play. Allow the discussion to be free flowing without a great deal of input from the facilitators.

## IV. LARGE GROUP DEBRIEFING (25 minutes)

Convene the participants as a large group and discuss the role play and the results of the small group debriefing sessions. If you need to stimulate the discussion, use some of the following questions:

**What issues did the group to which you were assigned discuss?**

Issues to watch for:
What will the Support Teacher be doing? What is the Support Teacher's role?
How is this role different from the what "good teachers are already doing"?
How much and what paperwork will be required to comply with regulations?
Is the IST program a regular education or special education program?
Who can best meet the needs of children with disabilities?
What is the role of special education under IST?
What about the concern of increasing class size?
What about the concern of the methods used to select the Support Teacher?
What about the concern about RIFFING staff?
Will IST dump special education children on regular education teachers?
What is the impact of IST on regular education?

**What paradigms were evident during the discussions?**

(Positive to facilitate IST as well as negative.)
The principal is the expert and should have all the answers.
Children with disabilities need special services which are provided by a distinct in a separate setting from other students.
Only teachers trained in special education can deal with the disabled population.
Administration is only interested in cutting costs and has no care about educational program.
Regulations are the be all and end all and must be followed regardless of their impact upon programs.
Protect turf, someone is invading my space.
Universities are pie-in-the-sky places with no foundation in practice.
Peer pressure can really control behavior of group members.
Special students can only be served with special placements.
IST--"This, too, shall pass."

**Was there any evidence of collaboration? Consultation?**

**Materials: Penn Ultimate Roll Play Situation hand out**
**"Staff Characters"**
**Observation sheet hand outs**

# Handouts for Session 9

**Penn Ultimate School District**
504 School House Lane, Hometown, BN

## SIMULATION ACTIVITY

Fran Williams, Principal of McArthur Elementary School, has just returned from the curriculum conference at a local University after attending a session on the Instructional Support System, a new initiative in which Penn Ultimate has decided to participate. Fran was excited about IST when the Superintendent announced that the district would participate. After discussing the initiative with members of the faculty at McArthur, Fran informed the Superintendent that McArthur would like to volunteer to be the first IST building in Penn Ultimate.

Excited about the information gained at the conference, Fran was anxious to get started on the project. After arriving at work following the conference, Fran received a telephone call from Dr. Jo Phillips, Assistant Superintendent, expressing the Superintendent's concern that plans and arrangements for the IST program should get underway. Dr. Phillips stated that Dr. Robinson wanted to meet with everyone involved in the project. The Superintendent wanted everyone updated on the results of the conference and the plans to implement IST at McArthur. Dr. Phillips asked Fran whom to invite since Fran had attended the conference and knew more about IST than anyone else in the district. Fran suggested inviting Pat Marshall, Instructional Support Teacher at McArthur Elementary School and Jan Jacobs, First Grade Teacher at McArthur Elementary School. Pat had been recruited and selected for the IST at Fran's request and was excited about the program and the fact that Fran had selected Pat from among the teachers at McArthur as the IST teacher. Jan was supportive of new ideas and had counseled Fran on several occasions about integrating instruction into the regular class setting. Jan was working with one specialist implementing such techniques in the classroom.

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Dr. Phillips agreed to the suggestions and scheduled the meeting for next week. However, when Dr. Phillips met with Dr. Robinson, several other persons were added to the list of participants in the meeting. Dr. Robinson, sensitive to the concerns of the special education staff of the District suggested inviting Lee Carolle, Supervisor of Special Education, and Sam Tucker, Chapter I Program Coordinator. In the rush to arrange the meeting, Dr. Phillips neglected to inform Fran of the other participants in the meeting. Dr. Phillips was not aware that Lee Carolle and Sam Tucker had invited others to the meeting. Lee had invited Lou Taylor, Chapter I Reading Specialist, McArthur Elementary School and Dana Rodgers, Special Education Teacher, McArthur Elementary School.

Fran arrives at the meeting with Pat and Jan. With all the participants assembled Dr. Robinson convenes the meeting. After a brief report about the conference by Fran, a discussion of the implementation of IST at McArthur begins. Dr. Robinson comments that consideration needs to be made of how IST will impact on other programs at McArthur.

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## Dr. B. Robinson, Superintendent

This year is an important year for you as the Superintendent of the Penn Ultimate School District. You are in the last year of your contract as the Superintendent and the Board will need to decide soon if you are to be retained. You don't want anything to rock the boat until the issue of your retention is resolved, although you will not back away from an issue you deem important. Your tenure at Penn Ultimate has been a successful one and you really believe the Board will renew your contract. However, two of the new board members, elected largely as result of a tax revolt, are restive. They are outspoken and can sway opinions on the Board.

The only new program underway in the District this year is the Instructional Support System. You volunteered the District to enter IST and believe the system has merits but you have also heard some grumbling from the special education and Chapter I reading staffs. The grumbling centers around the idea that their turf is being invaded. You do not agree with the grumbling but you want to make sure the program gets started promptly and there are no hitches as the year goes along. You don't want any financial problems or prolonged implementation delays. You need answers from Fran Williams. You want to know what the IST teacher will do that teachers are not already doing.

You are also concerned that this is another mandated state program which the District must implement only to see the state support disappear. You remember well what happened with the TELLS program when there was a change in the political winds in the state. Districts were left holding the bag when the funds disappeared.

**Now get into your role and participate in the meeting!!**

## Dr. Jo Phillips, Assistant Superintendent

Finally, you may be able to get something going in the elementary schools of Penn Ultimate. Ever since you assumed the duties of Assistant Superintendent, you have believed that more emphasis was placed on the secondary program. Dr. Robinson, because of a background in secondary education, seems more comfortable dealing with secondary issues. This is evident in the ease with which the secondary principals and the Superintendent interact. There just seems to be a great level of interaction which doesn't exist in the elementary area. However, IST just might be the vehicle to change that situation. You really believe that IST can work. It's supported by the literature, which you and Fran Williams have discussed several times. Now there is a principal who is going somewhere. What has been done at McArthur since Fran was appointed has been great. There is now an emphasis on what is good for kids rather than a strong emphasis on management and authority.

You have read the state regulations and believe strongly that IST has its greatest impact on regular education program and should be run by regular educators. You don't want to see the program get bogged down in trivial paperwork as has happened with special education. You are concerned that the special educators may do just that, bog the program down with forms and meetings and tests and on and on. You recognize the need for additional training for regular education teachers if IST is to be successful. You are concerned about the impact of the program on an already crowded curriculum and wonder how the guidance staff, a valued group to you, will fit into the process.

You are aware that this year is important for Dr. Robinson because the Superintendent's contract is up for renewal. You realize that you need to remain loyal but your chances to become a superintendent are becoming limited. If something should happen to Dr. Robinson, you want to make sure any program with which you have been associated has worked well. Otherwise, you want to make sure the blame falls elsewhere.

**Now get into your role and participate in the meeting!!**

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## Lee Carolle, Supervisor of Special Education

What changes have occurred in your life in the past year! Once comfortable working as a supervisor for the PDQ Intermediate Unit, you are now an employee of Penn Ultimate School District after the district decided to assume management of most of its special education programs. Dr. Robinson appears to like your management style and seems to turn to you whenever there is a question about special education. This new IST initiative could change all that. Despite the fact that IST is spelled out in the state special education regulations, Dr. Phillips and Fran Williams seem intent on keeping control of the program in regular education. You also believe that special educators really have a talent for adapting instruction to meet the needs of the individual child. You see the way IST is going as a definite threat to special education. You wonder what role special education will have in the IST process. After all, hasn't the state director of special education touted how many fewer special education students there will be if IST is successful? You must make people understand that before services can be provided, an MDE must occur. You must make sure people follow the laws, standards and regulations.

**Now get into your role and participate in the meeting!!**

## Terry Tucker, Chapter I Program Coordinator

Here comes another new program invading the reading and remedial education areas. Talk has already spread that IST will place students in remedial reading programs. Didn't anyone around here ever hear of federal regulations? Someone has to oversee the placement of students in Chapter I programs so that the guidelines are followed. Beside, you believe the pull out remedial programs have worked pretty well and you have the test data to show that they are effective. You wonder what Fran Williams' real goal is. Fran seemed too excited about IST at the staff meeting and now Fran has recently attended an IST conference. And what about the first grade teacher at McArthur, Jan Jacobs? Jan actually wants to have the Chapter I reading specialists work with students right in the classroom. That must be what they are teaching at that university Jan is attending. You have to be careful what happens or everyone will take over the program you personally have worked so hard to build.

**Now get into your role and participate in the meeting!!**

## Fran Williams, Principal

Last year you moved to McArthur Elementary and spent the year learning the lay of the land. Now you are ready to begin moving forward. You have read the latest research which indicates that handicapped children can succeed in the mainstream with adequate support. You believe IST is the right program at the right time. You see the Instructional Support System as a logical extension of your own ideas. You have been hearing a lot from Jan Jacobs, the first grade teacher who is attending the state university. Jan has been using some of the ideas in the first grade to which Jan was assigned and the techniques, at least, are not harming the children in any manner that you can tell. Jan has been collaborating with an itinerant speech and language teacher to introduce language skills in first grade. When Dr. Robinson presented the IST proposal at staff meeting, you were immediately interested. When you volunteered, Dr. Robinson seemed pleased. You know Jo Phillips, the Assistant Superintendent, supports the initiative and wants to see it succeed. You have had the opportunity to select the IST person for your building and chose Pat Marshall for the job. Pat was delighted to be chosen. One of the best teachers at using alternate strategies in the classroom, Pat has been one your strongest supporters on the faculty.

The meeting at the conference had indicated the need for a gradual approach for the first year of the IST program. The initiative requires many changes in paradigms and you learned that these changes are not easily accomplished. You also learned that collaboration and consultation are important means to accomplish the ends in the IST process. You know that the groundwork has been developed in your building and you believe you can successfully implement IST if given the time and resources necessary.

**Now get into your role and participate in the meeting!!**

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## Pat Marshall, Support Teacher

What a surprise it was when Fran Marshall asked you to be the IST person in the building! It was a real confidence booster when the principal said your talent was evident and wanted you to be the key person in the IST initiative. Fran may be new to the building, but there is certainly no question of the level of support for children. It is really great to have a principal who puts children in the forefront. It's such a difference between Fran and the former principal who thought being a principal involved getting the budget straight and keeping the teachers and students in line. If that principal were still here, you know McArthur would not be in the IST. You really want to see this program work and you believe given a chance, it will work. However, you also know Fran is going to need all the support which can be gathered to make the program succeed in this conservative district and building. You are not sure what your precise role will be or exactly how to do it. You are not certain with whom you will be working or whom you search out if you have questions. Will you be working directly with students? Exactly how are you to work with those teachers who are resistive and nervous about IST? But you do have faith in Fran. If only some of the established, conservative teachers in the building would get behind some of the new ideas, it would make Fran's job a lot easier. This meeting with the Superintendent could be crucial.

**Now get into your role and participate in the meeting!!**

## Jan Jacobs, First Grade Teacher

At last someone is listening to the ideas you have been talking about ever since you started taking courses at the university. Fran Williams was a breath of fresh air. Someone is now listening to some of the newer, more flexible teachers and seems willing to try new ideas. Fran has let you try out some of the ideas you have learned and, thanks to a cooperative itinerant speech and language teacher, you are trying some of the ideas in the area of language development. Collaboration seems to be working and the children certainly do not seem to be learning less. As a matter of fact, in your professional judgement, the children seem to be doing better. You know that some of the established, conservative teachers in the building disagree but you are going on despite their objections. Near the end of the year, some of the established, conservative teachers made it clear that you were rocking the boat too much. Their concerns prompted you to seek the advice of the teachers association vice-president, a teacher in McArthur. When Fran called you, it was clear your support may be needed when you attend the meeting with the Superintendent. You certainly want to support Fran. Collaboration, consultation, and empowerment seem to be concepts Fran believes and understands. But you need to maintain your relationship with your colleagues.

**Now get into your role and participate in the meeting!!**

## Lou Taylor, Chapter I Reading Specialist

Another fad comes down the road. You wonder what this IST is going to mean. It will probably blow over in a year or two and everyone can get back to the basics. Fran Williams is a real number. For a bright, young person, Fran doesn't seem to listen to the advice of the old pros on the faculty. Every new idea is a great idea. And that Pat Williams and Jan Jacobs. Where do they come off, telling the old pros how things should be done. You have talked to all three people and IST sounds like a mixture of things good teachers are already doing. It will probably mean more paper work and just delay the placement of children who really need special help. It will also mean more time for meetings which must cram into an already solid schedule. IST probably means more early morning and after school meetings. Yes, its just another fad and you remember open space classrooms, non-graded approaches, team teaching. Where are all those great ideas now? No one knows or seems to care. IST is just another fad!

**Now get into your role and participate in the meeting!!**

## Dana Rodgers, Special Education Teacher

Lee Carolle really seemed concerned during the call inviting you to attend the meeting about the IST program. Lee seemed to think that the regular educators were intent upon taking over special education services. What really caught your attention was the statement about RIFing staff in special education. As the teachers' association vice president, you cannot sit idly by while the district cuts special teachers and uses IST to enlarge class sizes. The whole faculty will be in an uproar. You are concerned about the feelings and attitudes of the other teachers at McArthur. You are concerned that IST is another means to cut the budget and dump special education problems on regular education teachers. And there is the issue of how Pat Marshall was chosen to be the IST in building. Talk is that the job was given because Pat is one Fran's gang and qualifications had nothing to do with the selection. You have to protect the troops against this intrusion into their employment rights. Dr. Robinson will not get away with this! United we stand, divided we fall!!

**Now get into your role and participate in the meeting!!**

# OBSERVER CHECKLIST

As the role play situation progresses, you are to observe the activity specifically looking for instances when the Principles of Effective Leadership are in evidence. Briefly, those principles are:

DECISIVENESS: ability to recognize that a decision is required and to take action; the ability to put an end to or a limit on controversy.

JUDGEMENT: The ability to make a decision or form an opinion objectively and wisely; the ability to establish priorities, formulate quality decisions, and reach logical conclusions based on educational needs and available data.

CAPACITY TO LEAD: The ability to instill vision, meaning, and trust in colleagues; the ability to empower others.

ORAL COMMUNICATION: The ability to express ideas clearly and correctly in formal and informal conversations with a variety of audiences; the ability to listen carefully and with purpose to ideas expressed by others.

WRITTEN COMMUNICATION: The ability to express ideas clearly and correctly (without errors) in writing; The ability to write appropriately for different audiences, eg., students, parents, teachers, community groups, etc.

ORGANIZATIONAL ABILITY: The ability to plan, schedule and manage one's responsibilities and the responsibilities of others; the ability to efficiently manage details.

PROBLEM ANALYSIS: The ability to analyze complex information; the ability to determine essential elements of a situation and to recognize their interrelationships.

PERSONAL MOTIVATION: The ability to define and pursue individual goals; the ability to possess a commitment to reach established goals.

SENSITIVITY: The ability to recognize and react appropriately to the needs and concerns of others; the ability to recognize and respect values of others form divergent backgrounds.

EDUCATIONAL VALUES: The ability to express sound, well-founded educational belief(s).

In addition, look for these specific issues and observe how the issues were addressed by the role play participants:

How did Fran react when it was learned that more people would be at the meeting other than those who were first discussed?

Is Dr. Robinson supportive of the IST program? Why or why not?

Did Dr. Robinson learn what the Support Teacher will be doing which is different from what good teachers already do?

How did Dr. Phillips address the concern about paper work and documentation?

How did Dr. Phillips address the need for training of regular education teachers?

How did Dr. Phillips address the role of the guidance component in IST?

How did Lee Carolle address the role of special education in the IST process?

What importance does Lee Carolle place on laws, standards, and regulations?

How will Chapter I interface with IST?

Did Fran Williams address the need to make the implementation of IST a gradual process?

Did Fran address the need for change and have a plan to implement that change?

Who will answer Fran's questions concerning the IST process?

How did Jan attempt to support Fran yet maintain good relations with Dana?

Did anyone address Lou's resistance to the IST process? How?

Did anyone address Dana's concerns about RIFing, class size, dumping special education problems on regular teachers?

# OBSERVER CHECKLIST

As the role play situation progresses, you are to observe the activity specifically looking for instances when the Principles of Effective Leadership are in evidence. Briefly, those principles are:

DECISIVENESS: ability to recognize that a decision is required and to take action; the ability to put an end to or a limit on controversy.

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How did Jan attempt to support Fran yet maintain good relations with Dana?

Did anyone address Lou's resistance to the IST process? How?

Did anyone address Dana's concerns about RIFing, class size, dumping special education problems on regular teachers?

# SESSION 10

**(3:00 - 3:45)**
(Principals/ GATEWAYS Consultant)
(Small Group)

# QUESTIONS and ANSWERS REGARDING THE INSTRUCTIONAL SUPPORT TEAM PROCESS

This informal session is an opportunity for participants to gain additional information from principal facilitators and regional consultants.

## Notes:

# DAY 4

# SESSION 11

**(9:00 - 10:00)**
(Principals and IST Consultants)
(Large group)

# MARKETING YOUR INSTRUCTIONAL SUPPORT TEAM PROCESS

This session is designed to provide participants with an overview of the rationale and means for facilitating institutionalization of IST at the building, district and community levels. In a brief didactic segment, participants will be exposed to basic principles of marketing. The application of these principles to gaining support for IST will be suggested. Potential stakeholder groups will be identified and discussed in terms of the messages each group needs to hear and the ways in which these messages can be delivered. A panel of Principal Facilitators will share how they are building awareness and gaining support for the IST process. There will be a question and answer period. Finally, participants will receive and review the IST Marketing Kit.

**GOALS FOR THIS SESSION:** Participants will gain an understanding of marketing principles of IST, identify key points to raise in building a district-wide rationale for IST, identify potential strategies for enhancing awareness and gaining support for IST at the building and district levels and review the IST Marketing Kit.

# FACILITATOR'S DIRECTIONS

In a large group setting, participants will be led by a facilitator and through a panel discussion to gain an understanding of the marketing of IST. Please review the attached text (session description, goals and outline) for the Marketing Session.

## Session Outline

I. Marketing IST

  A. "Marketing Truth"

  B. Stakeholders:

    - Who are they?
    - What do they need to hear?
    - How can we make sure they hear it?

II. Panel Discussion

III. Questions and Answers

## *MARKETING IST: NOTES FOR LEAD TRAINERS*

## I. Marketing IST ( 30 minutes)

### A. Marketing Truth

Marketing Truth handout/overhead: These five points provide the rationale for why principals need to always consider ways to keep IST "alive" in the public's awareness. Cover each point briefly. The source material is referenced on the handout: Levinson, 1984.

Also, refer participants to the PDE IST Marketing Kit. Briefly "walk through" the contents. Note that it includes five inserts with important information to build the IST rationale.

### B. Stakeholders

Trainer: See handout. There is a detailed chart which identifies the stakeholder groups, what they need to hear and how to help them hear it. This handout has all the "answers". But it might be good to have the participants generate some of this information before they review the handout carefully. For example, ask them to identify the stakeholder groups,the messages that are important for each group to hear, and the strategies that could be used to get these messages across. This would make this part of the session more interactive with responses being solicited from the audience. They can refer to the handout later.

## II. Panel Discussion (20 minutes)

Identify panelists. Three or four would work well. Have them prepare about 5-7 minutes worth of comments about how they have addressed the issue of IST awareness at the building, district and community levels. Talk to them beforehand so that you know what points they will cover and what additional points you might want to bring out in the Q&A. It might be helpful to have overheads or flip charts available so that any strategies mentioned by the panelists could be recorded for the audience. Perhaps another facilitator could be a session recorder).

## III. Questions and Answers (10 minutes)

**Materials:** **Marketing handouts**
**Marketing overheads**
**PDE IST Marketing Kit**

# Handouts for Session 11

# Marketing Your Instructional Support Team Success

Presenter:
Deborah Hartman

# AGENDA

## MARKETING YOUR IST SUCCESS

- How to Build Support
- Seven Steps to Advertising
- Marketing Truths
- Making Your Message Memorable
  Identifying Your Stakeholders
- Marketing Your Success. . .IST

# Marketing Truth

1. Marketing is constantly changing.

2. People forget fast.

3. Marketing strengthens your identity.

4. Marketing maintains morale.

5. Marketing allows your business to continue to operate.

Guerrilla Marketing: Secrets for making big profits from your small business. Jay Conrad Levinson, 1984

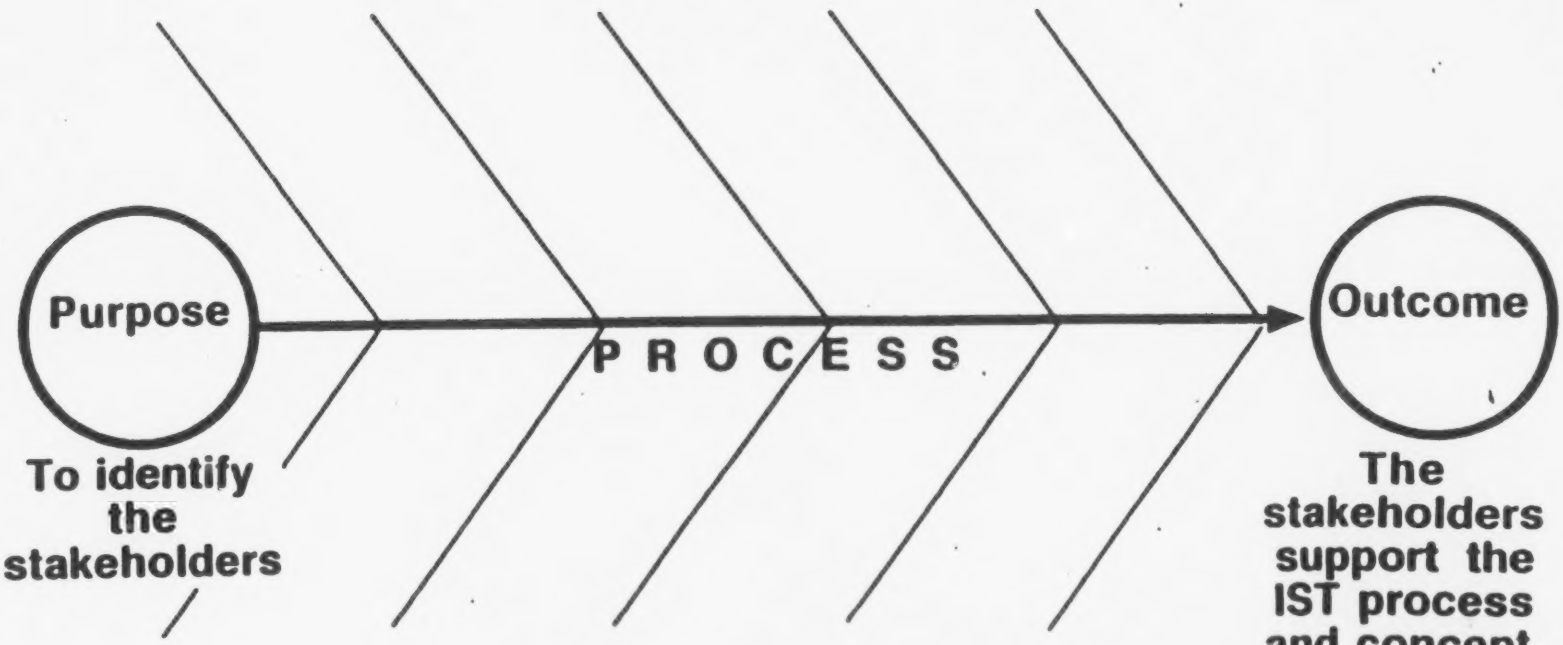
# 7 STEPS TO ADVERTISING

1. Find the inherent drama.
2. Translate it into a meaningful benefit.
3. states your benefits as believably as possible.
4. Get people's attention.
5. Motivate your audience to do something.
6. Be sure you communicate clearly.
7. Measure your finished product.

Guerrilla Marketing: Secrets for making big profits from your small business, ·Jay Conrad Levinson, 1984

Fishbone Diagram
Ishikawa Diagram

# Who are the stakeholders?



To identify the stakeholders

The stakeholders support the IST process and concept.

# Marketing Your Success... IST

Stakeholder: ____________________

| What message do they need to hear: | Marketing Options: |
|---|---|
| | |

# Marketing Your Success... IST

Stakeholder: **ADVOCACY GROUPS**

**What message do they need to hear:**

Equal opportunity for success in education.
IST increases self-esteem.
IST supports inclusion.
IST can reduce caseload to agencies.
Schools and agencies can work together more efficiently through IST.
IST is a holistic approach.
IST helps kids "at-risk".
IST addresses individual needs.
We'll help you.
We're on your side.
IST supports the least restrictive environment for all students.

**Marketing Options:**

Invite agencies to attend meetings.
Write newsletters.
Use advocacy groups to help to identify "at-risk" kids.
Get information for advocacy groups and invite them to participate on the team.

# Marketing Your Success... IST

Stakeholder: **CENTRAL OFFICE (Administration)**

**What message do they need to hear:**

Our IST successes are good public relations.
It assists in coordinating building efforts.
IST needs to continue and to expand.
IST is researched based.
IST reduces special education costs.
IST increase staff effectiveness.
We need YOU for support.
IST makes the district look good.
IST is good for morale.
IST is site based friendly.
IST is school reform.
IST reduces retentions.
We educate kids one at a time.
IST needs financial backing.
IST helps more children in a meaningful way.

**Marketing Options:**

Share success stories.
Attend administrative meetings.
Report to them parents' approval of IST.
Invite administrators to observe an IST meetings.
Create a newsletter.
Remind them that it is a state mandate.
Share statistics.
Invite them to attend IST training sessions.

BEST COPY AVAILABLE

# Marketing Your Success... IST

Stakeholder: **CHILDREN**

**What message do they need to hear:**

Children need to hear they are OK.
There is support for you.
Everyone can learn.
Learning can be fun!
You are capable.
We care about you, we want to help you.
We care.
IST helps to identify problems.
Nobody is perfect.
We all learn differently and at different speeds.
We will work together.
We are here for all kids.
You're special.
We are there for you.
You are important.
We will have success, we'll celebrate together.

**Marketing Options:**

Present group and class presentations regarding IST.
Utilize self charting strategies.
Provide rewards and special privileges.
Have student participate on the team.
Discuss IST freely with the student.
Student support groups.
Include IST purpose in student handbook.
Explain process in student assembly.
Share situations from novels and trade books students can relate to.

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# Marketing Your Success... IST

Stakeholder: **EXPANSION SCHOOLS**

**What message do they need to hear:**

It does work... it takes time...it's worth it.
We'll help you learn the process.
IST is a systematic approach.
IST has new ideas.
You're not alone.
We'll learn from each other.
We survived and are continuing to grow.
We'll share our forms, materials and strategies.
Depend in us--we care and share.
Slow and easy, step by step.
Be open.
We're believers.
Believers make believers.
IST improves staff morale.
Soon they'll be your kids.

**Marketing Options:**

Newsletter.
Show 'n tell.
Visits and observations.
Network meetings
Model a team meeting.
Model strategies.
Invite to IST meetings.
Video tape a meeting.
Panel discussion.
IST teacher shadowing.
Slide show.
Workshops.
In-servicing.

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# Marketing Your Success... IST

Stakeholder: **FACULTY**

**What message do they need to hear:**

It works!
You can do it!
It's not only your problem.
There's more than one way to skin a cat.
We are in this together. We're a team.
It's a good mandate!!
IST can't fix everything, but we'll try.
The problems are already there, so let's work together.
We need you to make it a success.
"Don't shoot the messenger."
Don't be afraid, we understand, we've been there.
Change doesn't have to be bad... it empowers you.
Take a risk.
You are a part of the team.

**Marketing Options:**

High quality in-services.
Word-of-mouth.
Newsletters.
Success stories.
Demonstrations of a team meeting.
Publicity.
Ask faculty members to participate in a team meeting.
Visit classrooms.
Ask faculty for input.
Get faculty involved.
Just help them...offer the services of the team.
Create a system with shared responsibility.

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# Marketing Your Success... IST

Stakeholder: PARENTS

What message do they need to hear:

IST equals success for your child.
IST means no failures.
IST can help your child change their attitude toward school.
It works...it will help your child.
We want your child to succeed.
Support our strategies.
You're important and you're part of this team.
Parents and school are a team.
We need your help.
We need to work as a team for success.
You know your child the best.
We need each other.
We're in it together for the children.
IST is not a referral to special education.
Cheaper, won't increase taxes.
Help without labeling.
Nip it in the bud.
Building your child's confidence.

Marketing Options:

PTA meetings.
Tea and coffee meetings.
Newsletter
Pamphlet /brochure.
Slide presentation.
Newspaper.
Parent orientation.
Parent volunteer program.
Strategies training workshop.

# Marketing Your Success... IST

Stakeholder: **SCHOOL BOARD MEMBERS**

**What message do they need to hear:**

IST can save you money.
Fewer retentions.
Less special education placements.
IST improves the district's image.
The state regulations.
"Children business."
Get more for your dollar.
Good utilization of staff talents.
Schools cost less than prisons.
Good for the community.
IST is not replacing learning support.
Provides help all constituents need.
Need to spend dollars to save dollars.
Assurance that it works.
Fewer retentions and special education placements.
Fewer parent problems.
We need your support.

**Marketing Options:**

School board presentation.
Show data.
Reports.
Invite members to IST meeting.
Testimonials from parents, students and staff.
Invite them to see strategies in action.
Slide presentation.
Model team meeting.
Success stories with charts.
Graphs, overlays.
Newsletters.
Graduation rates.
Visit classroom where IST is providing support.
Video.
Child written letters.

# Marketing Your Success... IST

Stakeholder: TAXPAYERS

**What message do they need to hear:**

Buy now or pay later.
IST will prevent dropouts and reduce retentions.
IST will reduce cost of special education.
IST strategies help all children.
Children are our future, education counts.
If you think education is expensive, try ignorance.
IST is a community effort.
IST gives you the most for your money.
IST will save money in the long run.

**Marketing Options:**

Share the cost of special education verses the cost of regular education with support.
Create district newsletter.
IST members should visit organizations i.e.: Rotary.
Get coverage in local newspaper.
Present IST to school board
Present IST to parent organizations, parent volunteers etc.
Prepare IST facts and figures.

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# Marketing Your Success... IST

Stakeholder: **UNIVERSITIES and COLLEGES**

**What message do they need to hear:**

They need to know IST works!
IST will help them become better teachers
It will teach them new strategies.
IST is failure prevention.
IST is research based.
IST will prepare you for the real world.
Early intervention equals higher college enrollments.
Trend--It's the new approach.
More college students, more college courses.
There is more to teaching than the manual.
Students will be more "employable".

**Marketing Options:**

Instruct pre-service teachers.
Invite professors and students to see the process in action.
Form a partnership with a university.
Offer mandated courses that include the components.
Articles regarding IST in alumni publications.
Present a model of a team meeting to a class of education majors.
Share success stories.

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# Marketing Your Success... IST

Stakeholder: ______________________________

| What message do they need to hear: | Marketing Options: |
|---|---|
| | |

# REFERENCES

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# Overheads for Session 11

# Marketing Truth

1. Marketing is constantly changing.

2. People forget fast.

3. Marketing strengthens your identity.

4. Marketing maintains morale.

5. Marketing allows your business to continue to operate.

Guerrilla Marketing: Secrets for making big profits from your small business. Jay Conrad Levinson, 1984

# 7 STEPS TO ADVERTISING

1. Find the inherent drama.
2. Translate it into a meaningful benefit.
3. states your benefits as believably as possible.
4. Get people's attention.
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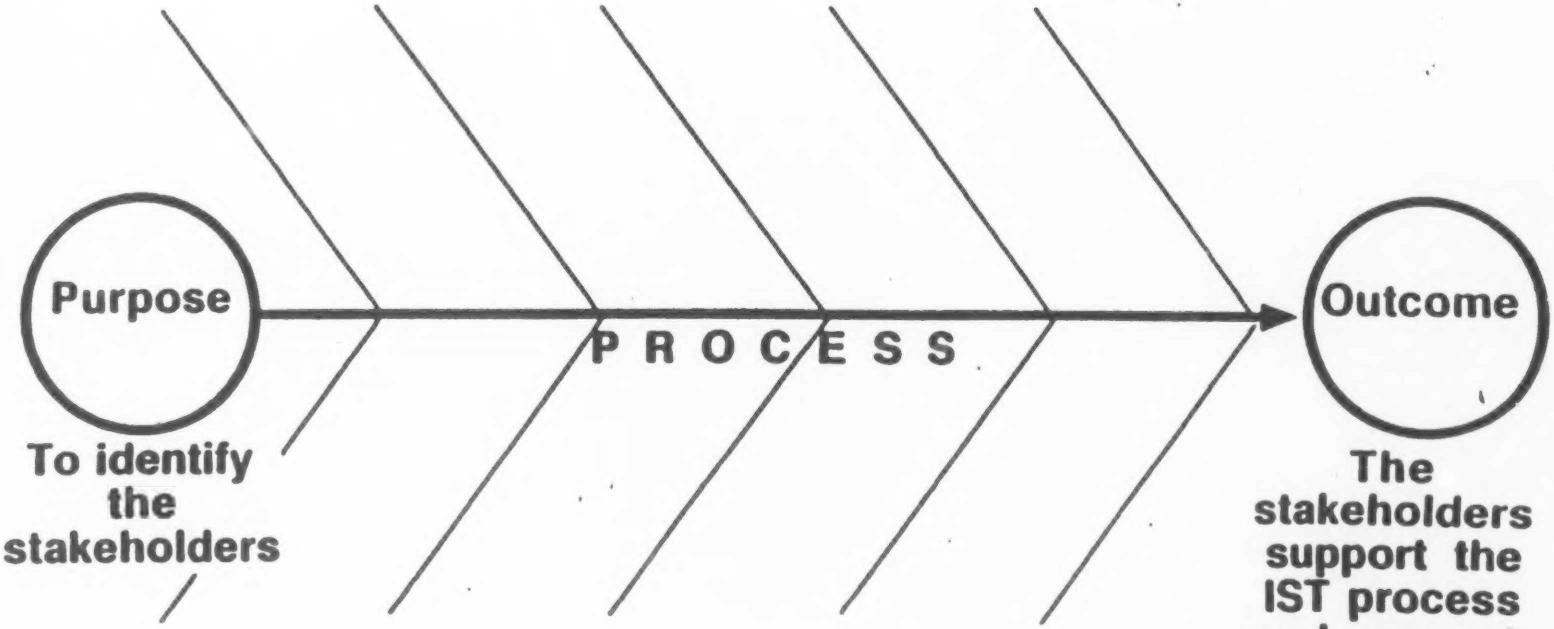
Fishbone Diagram
Ishikawa Diagram

# Who are the stakeholders?



**Purpose**

**P R O C E S S**

**Outcome**

**To identify the stakeholders**

**The stakeholders support the IST process and concept.**

# Marketing Your Success... IST

Stakeholder: ____________________

| What message do they need to hear: | Marketing Options: |
|---|---|
| | |

# Marketing Your Success... IST

Stakeholder: ADVOCACY GROUPS

| What message do they need to hear: | Marketing Options: |
|---|---|
| Equal opportunity for success in education.<br>IST increases self-esteem.<br>IST supports inclusion.<br>IST can reduce caseload to agencies.<br>Schools and agencies can work together more efficiently through IST.<br>IST is a holistic approach.<br>IST helps kids "at-risk".<br>IST addresses individual needs.<br>We'll help you.<br>We're on your side.<br>IST supports the least restrictive environment for all students. | Invite agencies to attend meetings.<br>Write newsletters.<br>Use advocacy groups to help to identify "at-risk" kids.<br>Get information for advocacy groups and invite them to participate on the team. |

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# Marketing Your Success... IST

Stakeholder: **CENTRAL OFFICE (Administration)**

**What message do they need to hear:**

Our IST successes are good public relations.
It assists in coordinating building efforts.
IST needs to continue and to expand.
IST is researched based.
IST reduces special education costs.
IST increase staff effectiveness.
We need YOU for support.
IST makes the district look good.
IST is good for morale.
IST is site based friendly.
IST is school reform.
IST reduces retentions.
We educate kids one at a time.
IST needs financial backing.
IST helps more children in a meaningful way.

**Marketing Options:**

Share success stories.
Attend administrative meetings.
Report to them parents' approval of IST.
Invite administrators to observe an IST meetings.
Create a newsletter.
Remind them that it is a state mandate.
Share statistics.
Invite them to attend IST training sessions.

BEST COPY AVAILABLE

# Marketing Your Success... IST

Stakeholder: **CHILDREN**

**What message do they need to hear:**

Children need to hear they are OK.
There is support for you.
Everyone can learn.
Learning can be fun!
You are capable.
We care about you, we want to help you.
We care.
IST helps to identify problems.
Nobody is perfect.
We all learn differently and at different speeds.
We will work together.
We are here for all kids.
You're special.
We are there for you.
You are important.
We will have success, we'll celebrate together.

**Marketing Options:**

Present group and class presentations regarding IST.
Utilize self charting strategies.
Provide rewards and special privileges.
Have student participate on the team.
Discuss IST freely with the student.
Student support groups.
Include IST purpose in student handbook.
Explain process in student assembly.
Share situations from novels and trade books students can relate to.

BEST COPY AVAILABLE

# Marketing Your Success... IST

Stakeholder: EXPANSION SCHOOLS

**What message do they need to hear:**

It does work... it takes time...it's worth it.
We'll help you learn the process.
IST is a systematic approach.
IST has new ideas.
You're not alone.
We'll learn from each other.
We survived and are continuing to grow.
We'll share our forms, materials and strategies.
Depend in us--we care and share.
Slow and easy, step by step.
Be open.
We're believers.
Believers make believers.
IST improves staff morale.
Soon they'll be your kids.

**Marketing Options:**

Newsletter.
Show 'n tell.
Visits and observations.
Network meetings
Model a team meeting.
Model strategies.
Invite to IST meetings.
Video tape a meeting.
Panel discussion.
IST teacher shadowing.
Slide show.
Workshops.
In-servicing.

BEST COPY AVAILABLE

# Marketing Your Success... IST

Stakeholder: **FACULTY**

**What message do they need to hear:**

It works!
You can do it!
It's not only your problem.
There's more than one way to skin a cat.
We are in this together. We're a team.
It's a good mandate!!
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"Don't shoot the messenger."
Don't be afraid, we understand, we've been there.
Change doesn't have to be bad... it empowers you.
Take a risk.
You are a part of the team.

**Marketing Options:**

High quality in-services.
Word-of-mouth.
Newsletters.
Success stories.
Demonstrations of a team meeting.
Publicity.
Ask faculty members to participate in a team meeting.
Visit classrooms.
Ask faculty for input.
Get faculty involved.
Just help them...offer the services of the team.
Create a system with shared responsibility.

BEST COPY AVAILABLE

# Marketing Your Success... IST

Stakeholder: PARENTS

**What message do they need to hear:**

**IST equals success for your child.**
**IST means no failures.**
**IST can help your child change their attitude toward school.**
**It works...it will help your child.**
**We want your child to succeed.**
**Support our strategies.**
**You're important and you're part of this team.**
**Parents and school are a team.**
**We need your help.**
**We need to work as a team for success.**
**You know your child the best.**
**We need each other.**
**We're in it together for the children.**
**IST is not a referral to special education.**
**Cheaper, won't increase taxes.**
**Help without labeling.**
**Nip it in the bud.**
**Building your child's confidence.**

**Marketing Options:**

**PTA meetings.**
**Tea and coffee meetings.**
**Newsletter**
**Pamphlet /brochure.**
**Slide presentation.**
**Newspaper.**
**Parent orientation.**
**Parent volunteer program.**
**Strategies training workshop.**

# Marketing Your Success... IST

Stakeholder: **SCHOOL BOARD MEMBERS**

What message do they need to hear:

IST can save you money.
Fewer retentions.
Less special education placements.
IST improves the district's image.
The state regulations.
"Children business."
Get more for your dollar.
Good utilization of staff talents.
Schools cost less than prisons.
Good for the community.
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Need to spend dollars to save dollars.
Assurance that it works.
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We need your support.

Marketing Options:

School board presentation.
Show data.
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Testimonials from parents, students and staff.
Invite them to see strategies in action.
Slide presentation.
Model team meeting.
Success stories with charts.
Graphs, overlays.
Newsletters.
Graduation rates.
Visit classroom where IST is providing support.
Video.
Child written letters.

# Marketing Your Success... IST

Stakeholder: **TAXPAYERS**

| What message do they need to hear: | Marketing Options: |
|---|---|
| Buy now or pay later.<br>IST will prevent dropouts and reduce retentions.<br>IST will reduce cost of special education.<br>IST strategies help all children.<br>Children are our future, education counts.<br>If you think education is expensive, try ignorance.<br>IST is a community effort.<br>IST gives you the most for your money.<br>IST will save money in the long run. | Share the cost of special education verses the cost of regular education with support.<br>Create district newsletter.<br>IST members should visit organizations i.e.: Rotary.<br>Get coverage in local newspaper.<br>Present IST to school board<br>Present IST to parent organizations, parent volunteers etc.<br>Prepare IST facts and figures. |

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# Marketing Your Success... IST

Stakeholder: **UNIVERSITIES and COLLEGES**

**What message do they need to hear:**

- They need to know IST works!
- IST will help them become better teachers
- It will teach them new strategies.
- IST is failure prevention.
- IST is research based.
- IST will prepare you for the real world.
- Early intervention equals higher college enrollments.
- Trend--It's the new approach.
- More college students, more college courses.
- There is more to teaching than the manual.
- Students will be more "employable".

**Marketing Options:**

- Instruct pre-service teachers.
- Invite professors and students to see the process in action.
- Form a partnership with a university.
- Offer mandated courses that include the components.
- Articles regarding IST in alumni publications.
- Present a model of a team meeting to a class of education majors.
- Share success stories.

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# Marketing Your Success... IST

Stakeholder: ______________________________

| What message do they need to hear: | Marketing Options: |
|---|---|

# SESSION 12

**(10:30 - 11:30)**
(Principals Facilitating)
(Small Group )

# STARTING TO MAKE CONNECTIONS

The purpose of this session is to develop an awareness among principals that IST should not be an isolated initiative. Rather, participants should begin to understand the importance of connecting IST with other programs and practices at the building level in order for IST to become a vital and integral part of their efforts toward school improvement.

**GOAL FOR THIS SESSION:** Principals will gain an understanding of IST as a vehicle for delivery of other services to at-risk students and students with disabilities.

# FACILITATOR DIRECTIONS

### I. Personal Experiences (15 minutes)

The purpose of this session is to help participants understand the versatility of the IST process. Facilitators should speak from experience as to how connecting IST with other school programs has helped IST to take hold in schools. In addition, indicate how IST has helped you as a principal to integrate various programs together in developing a seamless system of service for students. The interface between IST and remedial reading services (e.g., Chapter I) would be a good example to use.

### II. Perceived Stakeholders (10 minutes)

Distribute the enclosed handout on Stakeholders to all participants. Display overhead of the handout and explain the group activity. The participants' task is to list various programs in their schools that provide services for students. You may want to provide a few examples or solicit them from the group. After all the programs are listed, participants should identify who the critical stakeholders are in those programs (e.g., remedial reading teachers, guidance counselors, etc.). This task should be done individually by each participant.

### III. Connecting the Stakeholders (30 minutes)

Have members of the group share their lists and stakeholders with each other. Have one scribe develop a common list. After the list is completed, facilitate a discussion on how these various programs can connect with the IST process. Indicate these connections in the third column. Advise the praticipants that it may take a year or more of training for the school to figure out exactly how these programs articulate. However, getting a general idea of the need for this planning is an important first step in addressing a critical issue in IST.

### IV. Sharing (10 minutes)

Chose a group to share its matrix with the rest of the participants. Have other groups add other programs and stakeholders that were not listed by the first group. During each group's presentation, encourage participants to comment on their ideas on interfacing. Instruct the participants that they should take their individual matrices home for use in the Action Planning process. Advise that this matrix may help them develop their continuum of services which will be needed in the development of their program.

### V. Wrap up and training evaluation (10 minutes)

Field any questions still remaining. Pass out and collect all evaluation forms.

**Materials:** **Stakeholder overhead and hand out**
**Evaluation Forms**

# Handouts for Session 12

## STAKEHOLDERS ACTIVITY

| Programs and Services | Critical Stakeholders | Connection with IST |
|---|---|---|
| | | |

# Overheads for Session 12

## STAKEHOLDERS ACTIVITY

| Programs and Services | Critical Stakeholders | Connection with IST |
|---|---|---|
| | | |